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MONTCLAIR VILLAGE RETAIL MARKET STUDY
Oakland, California

Prepared for:
The City of Oakland
and
The Montclair Business Association

Prepared By:
Bay Area Economics
and
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August 1992

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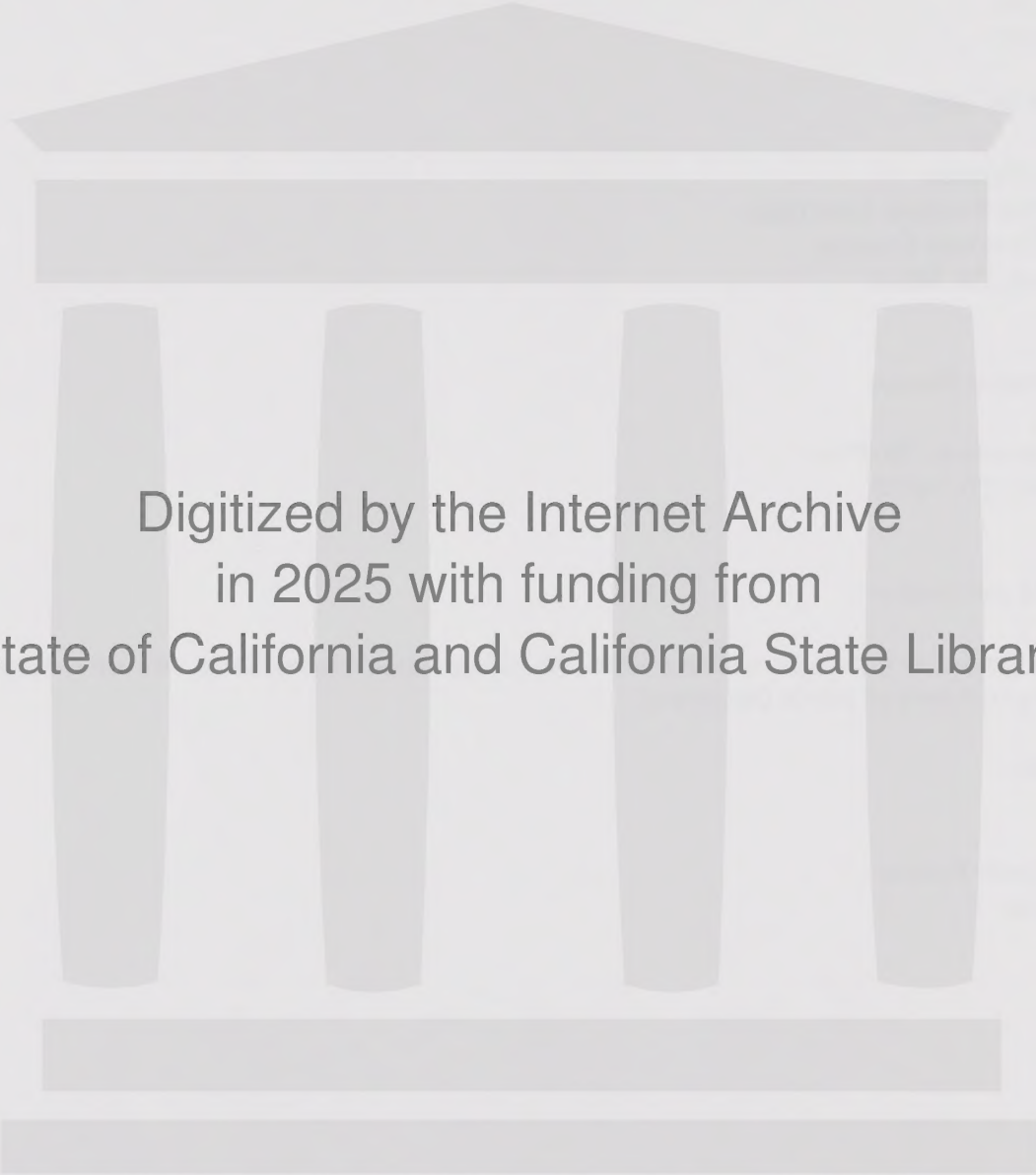
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Dear Al and Heather:

We are pleased to submit the enclosed Montclair Village Retail Market Study. We have enjoyed working with both of you on this project.

Sincerely,

Janet Smith-Heimer
Principal



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EXECUTIVE SUMMARY

Introduction

This study assesses current and probable future retail market conditions in Montclair Village, a shopping district located in the hills of Oakland, California. This study is especially timely as it coincides with the rebuilding of residential neighborhoods surrounding the Village following the devastating 1991 Berkeley-Oakland Hills Fire.

The Retailing Environment

Montclair Village currently has many of the raw ingredients that other neighborhood shopping centers and business district seek, such as two strong anchor tenants that attract numerous shoppers on a daily or weekly basis, a junior department store offering name brand apparel and accessories, a charming small-town ambiance, a beautiful setting, friendly merchants with a long-standing interest in the community, and highway accessibility. However, the Village's retailing picture is constrained by its remote location and lack of highway visibility, its perceived mix of too few retail versus too many service businesses, its lack of easy parking, and its layout with portions unconnected to other areas.

The Village's retail sales may also be affected by the October 1991 Oakland Hills fire. Many residences within the Market Area and just beyond its periphery were destroyed by the fire. An estimated 1,000 to 1,500 residents in the Market Area lost their homes. Ultimately, though, most of the housing will be rebuilt; this study assumes that the resident population in units affected by the fire (either the previous residents or new residents who will occupy rebuilt units) will return during the next two to three years.

Definition of the Market Area

The Market Area for Montclair Village has been defined as covering several Census Tracts, based on discussions with local merchants. The Market Area extends east to the Contra Costa County line, south to Joaquin Miller Road and Lincoln Avenue, west through the City of Piedmont, and north to Tunnel Road. In total, this Area contains approximately 31,000 persons, and 12,400 households.

Demographic and Economic Overview

Residents of the Market Area are generally older and more affluent than Oakland and the Inner Bay Area. In addition, the Market Area has a much higher proportion of owner-occupied households and households classified as families of related individuals, substantially higher household incomes, and more expensive housing than the City or the region. The largest concentration of residents is in the middle age ranges, and children under 18 are present in proportion slightly under the region as a whole.

The majority of employed residents in the Market Area have Professional and Executive/Administrative occupations.

These Market Area characteristics suggest a very strong retail market for all types of goods and services. The affluence of Market Area households should be able to successfully support numerous retail facilities in the Village.

Current Retail Activity

Montclair Village had approximately \$60.5 million of retail sales in 1990. These sales occurred in a relatively healthy real estate environment; only 4.9 percent of commercial space was vacant according to a 1991 inventory conducted by the City of Oakland. This low vacancy rate, coupled with relatively high rents for retail space, indicates that merchants in Montclair recognize the strong sales potential offered by the exceptional demographics and pleasant atmosphere of the Village and its surrounding residential areas.

Retail sales in the Village are dominated by grocery and other convenience goods. A leakage analysis, comparing actual sales against potential sales for the Market Area, indicates that the Village is not the location for most purchases made by Market Area residents.

Overall, 78 percent of possible sales were "leaking" outside the Village. While neighborhood shopping districts like the Village generally do not capture all potential sales, this overall leakage is considered high, and suggests that additional sales from Market Area residents could occur in the Village if appropriate retail goods were offered and merchandising strategies were followed.

Grocery stores and drugstores appear to be capturing close to the level of sales that are typically found in neighborhood shopping centers. The categories for which lower levels of potential sales were actually captured by the Village include restaurants, apparel, specialty goods, general

merchandise, home furnishings/appliances, building materials, packaged liquor, service stations, and automobiles/auto supplies.

A survey of residents in Montclair and Piedmont indicated that grocery stores were the major draw to the Village. The main reasons why shoppers did not come to the Village to buy their groceries were the lack of variety and greater convenience of other grocery stores.

Although substantial numbers of respondents did eat out in the Village, there were also substantial numbers who frequently dined elsewhere; quality and variety of restaurants in other locations were the most often cited reasons. The low capture rate of potential sales for restaurants in the Village (only 17 percent) suggests that this category could enhance its sales with the addition of facilities targeted and marketed to local residents.

Only 10 percent of respondents cited the Village as their most frequent location for clothing purchases. Instead, residents were shopping in San Francisco, Walnut Creek, and elsewhere due to greater variety and convenience.

Retail Performance

Sales in the Village were compared to sales in communities with similar demographics and retail mix (e.g., no regional shopping centers). Cities used for the comparative analysis were Orinda, Moraga, Lafayette, San Anselmo, and San Carlos. Montclair had the lowest per capita taxable sales in 1990, at \$1,371 per resident. The other communities ranged from \$2,563 per capita in Orinda to \$7,500 per person in San Carlos. These data show that given the population in the Montclair Market Area, the performance of the retail base is weak. If the Village were performing as well as Orinda/Moraga on a per resident basis, taxable sales in the Village would be double their current level.

Sales trends during the past two years were also compared for these similar cities and the Village. Total village sales rose 1.15 percent on an inflation-adjusted basis. Lafayette and San Anselmo experienced substantial declines for the period (-4.36 and -11.55 percent, respectively). Moraga, Orinda, and San Carlos all experienced increases in sales, ranging from 3.12 to 9.43 percent. Thus, while Montclair sales are low on a per capita basis compared to these other communities, its recent trend of sales has been modestly positive.

Montclair sales trends were also compared with Oakland and Alameda County to place local patterns in perspective. In the last complete year for which data are available, the Montclair Area's sales eroded more quickly than Alameda County as a whole (-3.72 percent as compared

with -1.66 percent), yet the Montclair still managed to fare substantially better than the City of Oakland where sales were off 5.82 percent.

Per square foot sales in Montclair were compared to industry averages to ascertain if existing stores could be performing at higher levels. Some categories of stores in the Village, including grocery stores, drugstores, and specialty stores, are generating relatively high sales per square foot. Others are not performing as well as industry averages for the U.S., including apparel stores, restaurants, and home furnishings.

The residents survey conducted for this study asked respondents about ways to improve the Village to encourage them to shop more frequently. The most often-mentioned responses to this question were improve parking, improve the retail mix, and decrease the amount of non-retail facilities at ground level. Less often-mentioned ways to encourage more shopping included lower prices, later business hours, better customer service, change in visual appearance, and better security.

With respect to parking, it is important to note that while parking was the most frequent answer to the "wish list" of what could encourage more shopping, parking was barely cited by respondents as the reason they go elsewhere for groceries, apparel, and restaurants. The issue of parking should be kept in perspective; it is likely that while the parking situation in the Village is a concern for many shoppers, it is not the primary reason they go elsewhere for their shopping.

The Potential for Additional Sales

An estimated additional \$33.0 million in retail sales could be captured by the Village, given an appropriate retail mix, enhanced marketing, and stronger promotional activities. Of the total, an estimated \$6.6 million could occur in existing outlets. Apparel stores which currently exist in the Village could all absorb additional apparel sales, based on a comparison of actual sales per square foot with industry averages.

The balance of capturable sales, an estimated \$25.5 million, could occur in new stores. New stores could be supported in the categories of drugstores, food stores, liquor stores, restaurants, home furnishings/appliances, building materials, and "other retail" (i.e., specialty).

Feasible New Store Types

New store types were identified which appear to be desired by the residents, supportable by potential capturable sales, and feasible given the retail industry and the locational characteristics of Montclair. These are as follows:

- **Restaurants.** In addition to the Lone Star Cafe that is opening in the Village, these could include high quality dining such as Olivetto's, upscale Asian (many examples in San Francisco). Family style restaurants such as Zachary's Pizza, Fatapple's (Berkeley and El Cerrito) or Sizzler would also fit well with the demographic profile of the Market Area.
- **Specialty Food.** In addition to the Noah's Bagels that is opening in the Village, this category of supportable new stores could include an "old style" bakery and butcher, as requested by the resident survey. A gourmet coffee/tea store would also complement the Village retail mix. All of these specialty food stores could be grouped together under one roof in a specialty food complex.
- **Home Furnishings.** This category could include smaller specialty home furnishings outlets such as lamp fixtures and fabrics. A small furniture store would also work; however, it is difficult to sell furniture in a small facility, given current merchandising trends.
- **Building Materials.** This category includes hardware and home improvement items which could be offered in one outlet.
- **Books/Records.** This category could include a Crown Books, a Tower Books/Records, or an independent offering a more targeted selection of merchandise.

Store types that residents suggested but were deemed not feasible due to limited market and/or industry trends toward mall locations include a variety store, department store, and movie theater. Other desired stores which are probably not feasible in terms of actual market support included a GAP, a women's clothing store, and Target. These survey responses probably reflect an interest in changing the type of merchandise offered by the existing merchants. Without closing existing facilities, new apparel stores would likely either be infeasible or, if successful, would cause declining sales at existing stores.

Strategies for Enhancing Retail Sales

There a variety of strategies that could be used to achieve improved retail sales at existing outlets and attract new stores to the Village. These include the following, presented in descending order of their likely impact on the Village's economic base.

- **Promote the Village's Strengths.** The Montclair Business Association undertakes several annual promotional activities including the popular Village Fair, the Sidewalk Sale, and periodic joint coupon mailers. However, these activities do not always involve all merchants, and they reportedly do not necessarily result in enhanced sales at existing stores.

A more consistent strategy of promotional activities with the express purpose of attracting infrequent shoppers or those that do not come at all but live nearby should be formulated. For example, the resident survey indicated that while grocery stores were the major draw to the Village, residents of Piedmont tended to frequent the Village less than residents of Montclair. This suggests a coordinated mail or advertising campaign targeted to Piedmont residents (e.g., large, affluent families with children). A "before school" promotional event (e.g. joint sale) would also serve this purpose.

The annual Sidewalk Sale also offers untapped potential. However, it is probable that actually moving goods out to the sidewalk is impractical for many merchants. This suggests that the concept of a discount promotional event held inside the stores would garner greater involvement of all merchants. Given the current economic climate, value of goods for sale should be stressed.

- **Target Merchandise.** This report provides extensive demographic information which lays the foundation for targeting merchandise to residents of the area. Retail categories such as apparel and gifts offered by some of the stores in the Village should be retargeted to offer a range of value, contemporary styling, popular brands, and/or high quality. The Market Area represents one of the best demographic profiles to be found in the Bay Area. Merchandise must be appealing to the sophisticated, affluent buyer who otherwise will choose to journey to Broadway Plaza in Walnut Creek, San Francisco, College Avenue in Berkeley/Oakland, or Piedmont Avenue.

- **Recruit New Stores.** This strategy can be as simple as supplying this report (especially the demographics and leakage sections) to active real estate brokers for their use when responding to new tenant inquiries. It can also be more elaborate, by involving volunteer or paid staff time to actually meet with site locators for some of the store types mentioned above.
- **Make Physical Improvements.** Finally, taking a cue from the resident survey, physical improvement strategies could be undertaken. For example, many respondents suggested that more convenient parking would encourage them to shop more frequently in the Village, although it is important to note that this factor did not explain why these residents shopped elsewhere for key retail items.

Parking and related traffic flow improvements can be an expensive undertaking. In addition, improving the parking pattern in the Village is difficult due to the lack of space to develop parking lots or garages. Nevertheless, this subject should be further explored by a parking expert.

Other physical improvements to the Village could also serve to enhance sales. For example, signage is an important item that is relatively cost-effective to improve. Many shopping districts have devised an attractive logo or series of themes, and implemented a banner/sign program promoting the concept throughout the area. For the Village, this could be as simple as placing signs and directories at all entrances to the district with an attractive "Montclair Village" logo. Individual store signs could also be made more attractive and consistent by instituting a sign ordinance or a voluntary program.

Finally, there are variety of architectural styles and building configurations in the Village, which add visual interest but also sometimes create a sense of dissonance. While major renovation of existing facades is not recommended, a set of design guidelines to steer future development and/or building renovations would be appropriate for the Village.

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INTRODUCTION

The purpose of this report is to assess current and probable future retail market conditions in Montclair Village, a shopping district located in the hills of Oakland, California. The Montclair Business Association, a membership organization of merchants with businesses in the Village, has requested this study as part of a larger planning process which seeks to preserve and enhance retail sales. The study is especially timely as it coincides with the rebuilding of residential neighborhoods surrounding the Village following the devastating 1991 Berkeley-Oakland Hills Fire.

Research for this study included discussions with local business owners, staff at the City of Oakland's Office of Economic Development and Employment (OEDE), and members and staff of the Montclair Business Association. Research also included a telephone survey of 100 households in the Montclair/Piedmont area. Sources of data analyzed in this study included taxable retail sales as reported by the State Board of Equalization, the 1980 and 1990 U.S. Censuses, National Planning Data Corporation, and the Association of Bay Area Governments (ABAG).

The following report describes the Village from a retailing perspective, defines the market area which the Village serves, analyzes demographic and economic data for the market area, assesses current retail sales and leakage patterns, estimates potential additional capturable sales, presents the findings of the shopper survey, and provides recommendations for improving retail sales in the Village.

THE MONTCLAIR VILLAGE RETAILING ENVIRONMENT

Montclair Village is the commercial heart of the eastern Oakland hills residential area known as Montclair. For purposes of this study, the Village is defined as the clustering of businesses which centers on Mountain Boulevard where it intersects with Merced Avenue, Antioch Street, Antioch Court, LaSalle Avenue, and Medau Place.

As a whole, the Village offers the feeling of a small-town shopping district. There is a distinct sense of being in a valley surrounded by pleasant hillsides dotted with single family homes. Buildings and streetscapes have a human scale, creating an invitation to stroll and browse. This character is even more pleasurable when the Village is considered in context as part of a major urban metropolitan area, not a remote small town. The Village's ambiance and distinct sense of "place" are perhaps its best and most memorable attributes.

The Village serves primarily as a neighborhood shopping center, although it is laid out more like a small downtown area. At the center of the shopping district, the intersecting streets of Antioch Street, Antioch Court, and Mountain Boulevard form a triangle, with streets extending from each point, resulting in a grid street pattern that is different from other, more linear Oakland shopping districts. The somewhat confusing street pattern and layout is compounded by a jumble of architectural styles, varying building densities, different building-to-street orientations, and haphazardly-placed parking lots.

From a retailing standpoint, the Village has several key strengths and weaknesses. Most neighborhood shopping districts are anchored by a grocery store; in the Village there are two thriving major grocery stores, Lucky's and Safeway. Both of these stores are smaller than their more modern-day prototypes, causing merchandising, inventory display, and parking problems. Nevertheless, there is substantial retail activity at these two "nodes," attracting many shoppers into the Village on a frequent basis. The "drawing power" of the two grocery stores is a strength that shopping center designers and developers strive to recreate in newer, planned shopping centers in order to attract shoppers to smaller stores. In other words, the Village already has one of the basic attributes necessary in any successful shopping center - two strong anchor tenants.

Beyond the physical ambiance of the Village, there are two other key strengths inherent in its present character. The general small-town feeling is echoed by the history of many of the stores in the Village, where merchants have provided goods and services to local residents for decades. The Village is not a trendy place where major chain stores come and go; it offers a longstanding

relationship with the surrounding community. Many other communities in the Bay Area seek this type of neighborhood goodwill, but it is not easily created.

Secondly, in addition to the grocery stores, the Village has McCaulou's, a "junior" department store selling men's and women's apparel, accessories, shoes, and gifts. Countless business districts and small town downtowns desire to attract a junior department store such as McCaulou's; however, most major department store chains no longer are willing to develop such a store type.

The Village also has several retailing weaknesses which prevent it from achieving high sales volumes. First, the multiple intersections interspersed with parking lots and confusing building orientations result in parts of the Village which do not relate to the whole. For example, the Village Square shopping complex, located about a block away from the main part of the Village, attracts numerous customers to its produce, bakery, and banking tenants. However, this complex has no physical relationship with the rest of the Village, making it difficult to combine shopping trips.

Another potential weakness of Montclair Village is the mix of types of retailers and other merchants. There is a perception, for example, that there are too few restaurants, and too many storefronts occupied by non-retail businesses such as real estate brokers. This issue is explored in more detail in this report.

Third, unlike other older neighborhood shopping districts in the East Bay, the Village is not easily accessed by pedestrians. Because most of the potential customers live "up the hill," they cannot stroll easily to the Village but must first drive their car, albeit a short distance, from their residence.

In addition to the difficulty of accessing the Village by local residents, its "out of the way" location vis-a-vis major thoroughfares makes it difficult to attract patrons from a broader market area. Although the Village has highway access via Highway 13, which could be considered a retailing asset, the shopping area is not visible from this major transportation route, constraining its ability to attract impulse shoppers that are passing by. The Village's location away from major transportation corridors is part of its charm; however, it is also one of its major weaknesses from a retailing perspective.

The Village's retail sales may also be affected by the October 1991 Oakland Hills fire. Many residences within the Market Area and just beyond its periphery were destroyed by the fire. According to the City of Oakland, almost 2,500 dwelling units were totally destroyed by the fire;

in the area designated as Lower Montclair (north of Thornhill, south of Highway 24, and east of Highway 13, 467 residential structures (primarily single-family homes) were damaged. Additional units within the designated Montclair Village Market Area but west of Highway 13 and north of Highway 24 were also destroyed. If one assumes that about 500 units were destroyed within the Market Area, and these households had the Area's average household size, approximately 1,000 to 1,500 residents in the Market Area lost their homes.

The short and long-term effects of the fire are unclear; in the context of an ongoing general recession, the effect of the short-term loss of such a small proportion of the Market Area's customer base (approximately four percent of the total) may be difficult to ascertain. Ultimately, most of the housing will be rebuilt; surveys by the City of Oakland indicate that a large majority of property owners are either planning on rebuilding, or selling their lots to others who will likely rebuild. In the interim, some businesses may be affected adversely, but others may benefit; for example, restaurants may see a boost in lunchtime business from construction workers, and apparel stores and home furnishings stores may see a short-term increase as residents replace lost possessions.

Due to the difficulty of quantifying the short-term impacts of the 1991 fire on retail sales in Montclair Village, this study assumes that the resident population in units affected by the fire (either the previous residents or new residents who will occupy rebuilt units) will return during the next two to three years.

In summary, Montclair Village currently has many of the raw ingredients that other neighborhood shopping centers and business district seek, such as two strong anchor tenants that attract numerous shoppers on a daily or weekly basis, a junior department store offering name brand apparel and accessories, a charming small-town ambiance, a beautiful setting, friendly merchants with a long-standing interest in the community, and highway accessibility. However, the Village's retailing picture is constrained by its remote location and lack of highway visibility, its perceived mix of too few retail versus too many service businesses, its lack of easy parking, and its layout with portions unconnected to other areas. All of these weaknesses can be addressed by a variety of strategies; the balance of this report is a starting point in that process.

DEFINITION OF THE MARKET AREA

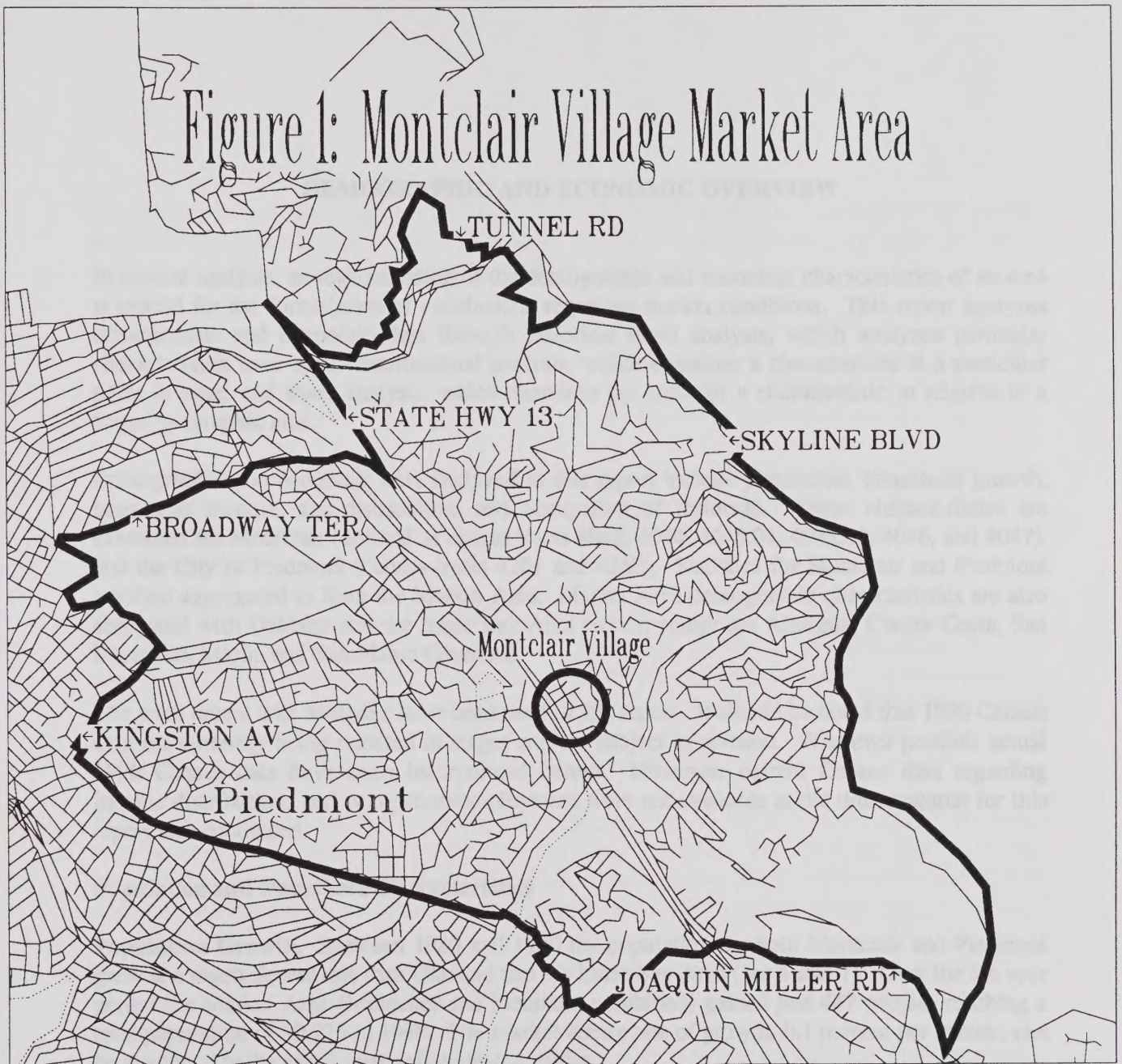
The market area for a retail shopping district is defined as the geographic area from which the majority of its customers are attracted. Shopping centers or districts generally fall into one of three categories which can be characterized by the type of goods sold and the distance from which customers are drawn: neighborhood, community, and regional centers.

Neighborhood shopping districts serve a local community that is usually drawn from within a one or two mile radius. A neighborhood district is typically dominated by stores selling convenience items such as food, drugs, sundries, and other frequently purchased goods. Community shopping centers are also dominated by convenience goods, but serve a larger geographic area by incorporating other stores selling less frequently purchased items such as apparel, toys, and hardware. Regional centers, serving areas with a 10 to 15 mile radius, generally offer a broader array of goods which are purchased based on a comparison of price and/or quality.

The current mix of establishments in Montclair Village is oriented primarily towards the surrounding neighborhoods' residents. However, the relatively broad array of specialty goods and the presence of the junior department store suggest that the Village could also attract from a larger community within a five mile radius. Several brief interviews with key Montclair Village retailers confirmed this. Managers of Lucky's, Safeway, Thrifty Jr., McCaulou's, Crogan's, and J. Coop, Ltd. provided rough estimates of the proportions of their customers drawn from Montclair, Piedmont, and other parts of Oakland and Berkeley. Five of the six managers reported that between 60 and 75 percent of their customers come from the immediately surrounding Montclair area. The sixth reported that approximately 40 percent of the store's business was derived from customers living in Montclair. These managers reported figures of between 15 and 40 percent of customers coming from Piedmont. Four of the six stores estimated that 10 percent or less of their business came from people living in other parts of Oakland, or Berkeley, while the remaining two stores reported no more than about 25 percent of their business comes from outside of Montclair or Piedmont.

Since most of the shoppers coming to the representative establishments reside in the Montclair or Piedmont areas, the Market Area for Montclair Village is defined as the following census tracts: 4042, 4044, 4045.01, 4045.02 (which contains Montclair Village), 4046, and 4047. The area covered by these census tracts extends east to the Contra Costa County line, south to Joaquin Miller Road and Lincoln Avenue, west through the City of Piedmont, and north to Tunnel Road. In total, this area contains approximately 31,000 persons, and 12,400 households. The boundaries of this market area are shown on Figure 1.

Figure 1: Montclair Village Market Area



DEMOGRAPHIC AND ECONOMIC OVERVIEW

In market analysis, an understanding of the demographic and economic characteristics of an area is crucial for the formulation of conclusions regarding market conditions. This report analyzes demographic and economic data through historical trend analysis, which analyzes particular characteristics over time; distributional analysis, which examines a characteristic at a particular point in time; and share analysis, which examines the share of a characteristic in relation to a larger geographic area.

Demographic and economic data analyzed in this report include population, household growth, household income, age distribution, and occupation of residents. These characteristics are examined for Montclair (defined as census tracts 4042, 4044, 4045.01, 4045.02, 4046, and 4047), and the City of Piedmont (census tracts 4261 and 4262). Statistics for Montclair and Piedmont are then aggregated to form the Market Area. Market Area demographic characteristics are also compared with Oakland and the Inner Bay Area (which comprises Alameda, Contra Costa, San Francisco, Marin, and San Mateo Counties).

The most recent data available have been used in this report. It should be noted that 1990 Census data are currently being released in stages and are subject to revision. Wherever possible actual 1990 Census data have been incorporated herein. However, current Census data regarding income distributions and occupation/employment were not available at the time research for this report was conducted.

Population and Household Characteristics

Population Growth. Between 1980 and 1990 the population for both Montclair and Piedmont grew at a much slower rate than Oakland and the Inner Bay Area (see Table 1). Over the ten year period the Market Area (Montclair and Piedmont combined) gained just 447 people, reaching a total population of 30,725 in 1990. The Market Area's rate of growth, 0.1 percent per annum, can be attributed to the area's relatively built-out nature.

Household Growth. The number of households also grew slowly in the Market Area between 1980 and 1990. Montclair experienced a net gain of just 256 households during this time period (compound annual growth rate of 0.3 percent), while Piedmont actually lost 8 households. Overall, the Market Area had a compound annual household growth rate of 0.2 percent between 1980 and 1990, equal to Oakland but slower than the Inner Bay Area. In 1990, the Market Area had a total of 12,354 households.

The relatively slow rate of growth for both population and households in the Market Area means that future increases in retail sales will likely not be achieved by a growing population, but rather, would have to come from increased capture of sales from existing residents.

Household Size. Average household size in 1990 was much smaller in Montclair (2.35) than Piedmont (2.82). The two neighborhoods bracket Oakland and the Inner Bay Area, where 1990 average household sizes were 2.52 and 2.53, respectively. On a combined basis, however, the Market Area's average, at 2.49 in 1990, was similar to both Oakland and the Inner Bay Area.

It is interesting to note that household size appears to be decreasing slightly in Montclair, dropping from 2.37 in 1980 to 2.35 in 1990. This trend is opposite that experienced in Piedmont, Oakland, and the Inner Bay Area as a whole, all of which had slight increases in household size during the decade.

Age Distribution. In 1990, the Market Area had a median age of 40.8, significantly higher than Oakland (32.7) and the Inner Bay Area (34.3). Unlike the household size distinctions between Montclair and Piedmont, median ages were similar for the two neighborhoods. It is important to note that the change in median age for the Market Area between 1980 and 1990 (37.5 to 40.8 years), was substantially greater than for Oakland or the Inner Bay. Thus, the demographics of the Market Area suggest a more rapid "aging" than for other parts of the region.

In 1990, more than 60 percent of the Market Area population was over 35 years of age, compared to 46 percent for Oakland and 49 percent for the Inner Bay Area. The age range of 35 to 54 was particularly concentrated in the Market Area; 37.4 percent of the Market Area was in this middle age group, compared with only 26.5 percent in Oakland and 25.4 percent in the Inner Bay Area.

Conversely, children under age 18 formed a smaller percentage of total Market Area population (20.6 percent) than in Oakland (24.9 percent) or the Inner Bay Area (21.9 percent).

The most significant differences between the Market Area and the larger geographies were in the young adult age categories of 18 to 24 and 25 to 34. In total, only 17.2 percent of the Market Area's population fell into these categories, compared with 29.6 percent for Oakland and 29.3 percent for the Inner Bay Area.

There are two age ranges which are markedly different between Montclair and Piedmont, as shown in Table 1. Piedmont had a higher concentration of children under age 18 in 1990 (26.9 percent) than Montclair (17.3 percent). In contrast, although the Market Area as a whole had a

relatively low concentration of young adults, this is particularly apparent for Piedmont vis-a-vis Montclair. While over 14 percent of Montclair's population was in the 25 to 34 age category in 1990, only 7.5 percent of Piedmont's residents were in this category.

In summary, the current age distribution and trends since 1980 indicate certain important attributes of the Market Area. While children are present in relatively typical proportions, young adults are not a factor. Rather, the Market Area is dominated by middle age residents.

Household Tenure and Type. Recent household tenure statistics reveal a substantially higher concentration of owner households in the Market Area (85.8 percent) than in Oakland (41.6 percent) and the Inner Bay Area (54.0 percent). Both Montclair and Piedmont had high homeownership rates, with 83.7 percent and 90.5 percent respectively. This characteristic suggests strong Market Area demand for housewares, furniture, and home improvement items.

Overall, the Market Area also has a relatively high concentration of family households (69.8 percent), compared with Oakland (58.0 percent) and the Inner Bay Area (62.1 percent). There are distinctions between Montclair and Piedmont, however; in 1990, Montclair had a much lower proportion of family households (65.7 percent) than Piedmont (79.1).

Household Incomes. Household incomes are an important indication of the amount and type of retail supportable in a market area. As shown in Table 2, the median household income in 1991 in the Market Area was \$72,387 compared to \$37,736 for the Inner Bay Area. Thus, the Market Area median household income was 92 percent higher than the region as a whole.

Overall, 29 percent of the Market Area households had incomes of \$100,000 or more, as compared with only 4.6 percent of Oakland's households and only 8.4 percent of the households in the Inner Bay Area. Another 18.6 percent of Market Area households fell in the \$75,000 to \$100,000 income bracket, compared with less than 10 percent for both Oakland and the region. At the other end of the spectrum, the Market Area had a very small concentration of low income households; only 5.6 percent of households in the Market Area earned less than \$15,000 in 1991, compared with 28 percent of Oakland's and 16.4 percent of the region's households.

Within the Market Area, there appears to be a substantial difference between Piedmont and Montclair. Piedmont's median household income (\$87,720) was dramatically higher than Montclair's (\$69,155). Household incomes of \$100,000 and over are also more concentrated in Piedmont than in Montclair. Another distinction between the two areas was evidenced in the \$50,000 to \$75,000 bracket; over 25 percent of Montclair fell into this upper-middle income range, while only 17.7 percent of Piedmont was in this category. Thus, although both Montclair

and Piedmont can be characterized as high income neighborhoods relative to Oakland and the region, Piedmont in particular falls at the very high end of the range, while Montclair has a distribution with more upper-middle incomes.

House Values. Table 3 presents recent 1990 Census data on owner-occupied house values. It is important to note that these are self-reported amounts, and may not precisely reflect market value if the unit were sold. Nevertheless, these data are a relative indicator of household affluence.

As shown, the Market Area house values reflect the high incomes described above. For the Market Area as a whole, almost 25 percent of units are reportedly worth \$500,000 or more. In contrast, only 3.6 percent of Oakland's housing units were reported in this category, and only 9.2 percent of the Inner Bay Area. Another 48.6 percent of Market Area units were valued between \$300,000 and \$500,000, compared to only 18.4 percent for Oakland and 24.1 percent for the region.

Table 1: Population and Household Trends in the Market Area, Oakland and the Inner Bay Area

	MONTCLAIR			PIEDMONT			MARKET AREA (a)			OAKLAND			INNER BAY AREA (b)		
			Annual			Annual			Annual			Annual			Annual
	1980	1990	Change	1980	1990	Change	1980	1990	Change	1980	1990	Change	1980	1990	Change
Total Population	19,780	20,123	0.2%	10,498	10,602	0.1%	30,278	30,725	0.1%	339,337	372,242	0.9%	3,250,630	3,686,592	1.3%
Number of Households	8,343	8,599	0.3%	3,763	3,755	0.0%	12,106	12,354	0.2%	141,657	144,521	0.2%	1,280,506	1,422,310	1.1%
Average Household Size	2.37	2.35		2.79	2.82		2.50	2.49		2.34	2.52		2.48	2.53	
Age Distribution															
Under 18	18.6%	17.3%		26.4%	26.9%		21.3%	20.6%		24.3%	24.9%		23.5%	21.9%	
18 - 24	6.9%	5.3%		7.0%	5.3%		6.9%	5.3%		12.5%	10.6%		12.4%	10.0%	
25 - 34	20.1%	14.2%		11.3%	7.5%		17.0%	11.9%		20.3%	19.0%		19.3%	19.3%	
35 - 54	28.0%	38.2%		29.2%	35.7%		28.4%	37.4%		20.0%	26.5%		23.5%	28.7%	
55 - 64	12.6%	9.6%		11.2%	9.9%		12.1%	9.7%		9.8%	7.0%		10.1%	8.2%	
65 and over	13.7%	15.4%		15.0%	14.6%		14.2%	15.1%		13.2%	12.0%		11.2%	11.8%	
Median Age	37.2	40.8		38.2	40.7		37.5	40.8		31.4	32.7		32.2	34.3	
Household Tenure															
Owners	82.8%	83.7%		90.5%	90.5%		85.2%	85.8%		43.5%	41.6%		53.3%	54.0%	
Renters	17.2%	16.3%		9.5%	9.5%		14.8%	14.2%		56.5%	58.4%		46.7%	46.0%	
Household Type:															
Family Households	67.6%	65.7%		81.1%	79.1%		71.8%	69.8%		56.2%	58.0%		62.6%	62.1%	
Non-Family Households	32.4%	34.3%		18.9%	20.9%		28.2%	30.2%		43.8%	42.0%		37.4%	37.9%	

Notes:

(a) Market Area is Montclair (census tracts 4042, 4044, 4045.01, 4045.02, 4046, 4047) and Piedmont (census tracts 4261 and 4262).

(b) Inner Bay Area consists of Alameda, Contra Costa, Marin, San Francisco, and San Mateo Counties.

Source: Bay Area Economics, based on information from 1980 and 1990 U.S. Censuses.

Table 2: Estimated Household Income Distribution, 1991

Household Income	Montclair	Piedmont	Market Area	Oakland	Inner Bay Area (a)
Less than \$15,000	5.3%	6.2%	5.6%	28.0%	16.4%
\$15,000 - 24,999	5.6%	3.8%	5.0%	17.2%	13.1%
\$25,000 - 34,999	6.9%	5.4%	6.5%	13.1%	12.8%
\$35,000 - 49,999	12.9%	11.2%	12.4%	15.4%	18.1%
\$50,000 - 74,999	25.2%	17.7%	22.9%	15.3%	21.5%
\$75,000 - 99,999	18.7%	18.4%	18.6%	6.2%	9.8%
\$100,000 and over	25.4%	37.3%	29.0%	4.6%	8.4%
Median Household Income	\$69,155	\$82,720	\$72,387	\$28,542	\$41,524

Note:
 (a) Inner Bay Area includes Alameda, Contra Costa, Marin, San Francisco, and San Mateo counties.

Sources: National Planning Data Corporation; Bay Area Economics

Table 3: Characteristics of Owner-Occupied Housing Units, 1990

Value of Specified Owner-Occupied Units (a)	Montclair		Piedmont		Market Area		Oakland		Inner Bay Area (b)	
	Count	Percent	Count	Percent	Count	Percent	Count	Percent	Count	Percent
Less than \$50,000	25	0.4%	16	0.5%	41	0.4%	1,686	3.4%	107,658	14.4%
\$50,000 to \$99,999	37	0.6%	14	0.4%	51	0.5%	9,577	19.0%	373,611	5.0%
\$100,000 to \$149,999	91	1.4%	28	0.9%	119	1.2%	9,159	18.2%	58,189	7.8%
\$150,000 to \$199,999	291	4.4%	35	1.1%	326	3.3%	7,933	15.8%	95,003	12.7%
\$200,000 to \$299,999	1,851	28.0%	252	7.9%	2,103	21.5%	10,873	21.6%	198,273	26.6%
\$300,000 to \$399,999	2,545	38.5%	509	16.0%	3,054	31.2%	6,674	13.3%	123,122	16.5%
\$400,000 to \$499,999	1,155	17.5%	546	17.1%	1,701	17.4%	2,580	5.1%	56,939	7.6%
\$500,000 or more	617	9.3%	1,787	56.1%	2,404	24.5%	1,806	3.6%	68,865	9.2%
Total	6,612	100.0%	3,187	100.0%	9,799	100.0%	50,288	100.0%	745,410	100.0%

Notes:

(a) Specified units include only one-family houses on less than 10 acres without a business or medical office on the property.

(b) Inner Bay Area includes Alameda, Contra Costa, Marin, San Francisco, and San Mateo counties.

Sources: 1990 Census of Population and Housing, Summary Tape File 1; Bay Area Economics.

Table 11. Comparison of Employment Residents, 1980

Occupation of Employed Residents	Market Area		Oakland		Inner Bay Area	
	Number	Percent	Number	Percent	Number	Percent
Executive/Administrative	3,477	55.2%	16,759	11.2%	21,576	14.9%
Professionals	2,188	35.2%	21,252	14.3%	21,470	14.8%
Technicians	1,198	19.2%	9,198	6.2%	24,758	17.1%
Other	1,300	20.8%	12,150	8.1%	17,300	12.0%
Total	6,363	100%	149,359	100%	145,104	100%

Occupation of Employed Residents

According to the most recent information available (1980), employed residents in the Market Area fall largely into two occupation categories; 55.2 percent were employed in Executive/Administrative or Professional occupations. In comparison, 25.9 percent of Oakland and 30.1 percent of the Inner Bay Area employed residents were classified in these occupational categories. These occupational characteristics are consistent with the high estimated household incomes and relatively high housing prices found in the Market Area.

Summary of Demographic and Economic Characteristics

In summary, residents of the Market Area are generally older and more affluent than Oakland and the Inner Bay Area. In addition, the Market Area has a much higher proportion of owner-occupied households and households classified as families, substantially higher household incomes, and more expensive housing than the City or the region. The majority of employed residents in the Market Area have Professional or Executive/Administrative occupations. The largest concentration of residents is in the middle age ranges, and children under 18 are present in proportion slightly under the region as a whole.

These Market Area characteristics suggest a very strong retail market for all types of goods and services. The affluence of Market Area households should be able to successfully support numerous retail facilities in the Village; the following sections assess the extent to which the Village's retail base capitalizes on the residents' demographic profile.

Table 4: Occupation of Employed Residents, 1980

Occupation of Employed Residents	Market Area		Oakland		Inner Bay Area (a)	
	Number	Percent	Number	Percent	Number	Percent
Executive/Administrative	3,577	22.6%	15,703	11.0%	215,736	14.5%
Professional	5,151	32.6%	21,325	14.9%	231,072	15.6%
Technical	469	3.0%	5,139	3.6%	58,758	4.0%
Sales	1,945	12.3%	12,120	8.5%	177,905	12.0%
Administrative Support	2,211	14.0%	31,725	22.2%	337,852	22.8%
Services	975	6.2%	21,539	15.1%	201,556	13.6%
Production/Craft	701	4.4%	12,980	9.1%	160,907	10.9%
Operator/Laborer	634	4.0%	20,694	14.5%	69,171	4.7%
Farm	161	1.0%	1,470	1.0%	29,862	2.0%
Total	15,824	100.0%	142,695	100.0%	1,482,819	100.0%

Note:

(a) Inner Bay Area includes the counties of Alameda, Contra Costa, Marin, San Francisco, and San Mateo

Sources: 1980 U.S. Census, Bay Area Economics.

CURRENT RETAIL ACTIVITY IN THE VILLAGE

This chapter describes the current level and type of retail activity in Montclair Village. In addition, the findings of the resident survey regarding shopping patterns are presented.

Commercial Space

Total Space. Montclair Village had a total of approximately 335,000 square feet of commercial space, with just over 176,000 square feet occupied by retail facilities, and 142,000 by service businesses, according to a space inventory taken by the City of Oakland in summer, 1991. The balance, or 16,700 square feet, was not occupied when the survey was taken (see Table 5).

Vacancy Rates. Table 5 contains summaries of the occupancy status of Montclair Village commercial space. According to the City survey, approximately 16,700 square feet were vacant, for an overall vacancy rate of 5.0 percent. Allowing for normal turnover of businesses, a vacancy rate at or below 5 percent is considered very healthy by industry experts. In the summer of 1991, the height of a local and national recession, the Village's low vacancy rate is a strong indicator that the Village is considered a desirable location and that businesses can succeed within it.

Over two-thirds of the total supply of commercial space is in ground-level "storefront" space. Of the 247,000 square feet of storefront space, 11,800 square feet were vacant, for a vacancy rate of only 4.8 percent. There were 88,000 square feet of space in non-storefront spaces, of which 4,900 were vacant, a rate of 5.5 percent. This figure, slightly higher than for storefronts, is quite healthy, considering the difficulties which can be encountered in leasing non-storefront spaces in neighborhood/community shopping centers.

Mix of Retail and Service Businesses. There has been much discussion by the Montclair Business Association and others regarding the perceived high proportion of storefronts in the Village occupied by service businesses. This is of concern to some merchants because service businesses do not necessarily attract shoppers who will patronize multiple stores, diminishing a synergism that otherwise could occur in a total retail storefront environment. Moreover, service establishments located at ground level sometimes have uninteresting window displays or blank walls, creating a gap in visual interest as one walks past.

As shown on Table 5, 40 of the 110 total storefront spaces in the Village are occupied by service establishments. This translates into 37 percent of all storefronts. The average retail storefront

Table 3 - Mendocino Valley Commercial Sector Inventory, January 1991

Type of Space	Total Square Feet	# Establish.	Manufacturing				Non-manufacturing	
			Retail Square Feet	# Establish.	Wholesale Square Feet	# Establish.	Services Square Feet	# Establish.
Manufacturing	254,512	115	175,952	81	78,560	34	11,000	4.2%
Non-manufacturing	18,000	98	1,000	4	17,000	94	16,979	92.4%
Total Space	272,512	213	176,952	85	95,560	128	27,979	13.6%

establishment is approximately 2,500 square feet in size, while the average non-retail storefront establishment is just under 1,500 square feet.

Notes:

Total does not include storage facilities (13 in all) or public space.

Source: City of Ukiah, Planning Department, Big Area Land Use.

Table 5 : Montclair Village Commercial Space Inventory, Summer 1991

Type of Space	Total Square Feet	# Estab.	Occupied Space				Vacant Space	
			Retail Square Feet	# Estab.	Non-Retail Square Feet	# Estab.	Square Feet	% Vacant
Storefront Space	246,812	110	175,352	70	59,641	40	11,819	4.8%
Non-Storefront Space	88,061	96	800	1	82,387	95	4,874	5.5%
Total Space	334,873	206	176,152	71	142,028	135	16,693	5.0%

Note:

Table does not include service stations (2) or drive-up photo store.

Sources City of Oakland, Planning Department; Bay Area Economics.

Current Rents. Table 6 details rent characteristics for establishments in the Montclair Village area, as surveyed by the City of Oakland in the summer of 1991.

In general, the data indicate that commercial rental rates in the Village are relatively high. As shown in Table 6, 36 percent of all storefront establishments pay more than \$2.00 per square foot per month in rent, and 18 percent of the non-storefront establishments paid more than \$2.00 per month. The higher premiums for storefront space are in keeping with the typical commercial rent patterns in neighborhood shopping districts, where ground level retail space is more desirable than second level space.

There is a slightly higher concentration of establishments paying high rents in the large storefront space category (1,000 square feet or more), where 37 percent of this group, or 24 establishments, pay more than \$2.00 per square foot per month, as compared to 34 percent, or 10 establishments, in small storefronts (less than 1,000 square feet). This pattern is somewhat inconsistent with most shopping districts, where smaller stores usually command higher rents per square foot.

It is interesting some the non-retail service businesses in storefronts pay rents at the high end of the range, above \$2.25 per square foot. For example, services make up 50 percent of the storefront establishments which pay \$2.26 to \$2.75, and 50 percent of those in the range of \$2.76 to \$3.00. Service establishments account for 69 percent of the establishments which pay more than \$3.00 per square foot for rent. These statistics, shown graphically in Figure 2, indicate a willingness on the part of certain service establishments to pay high rents for storefront space in Montclair Village. This pattern, typical of many neighborhood shopping districts, can sometimes lead to a preponderance of non-retail facilities when there is strong demand for both types of space.

Table 6: Rent Distribution by Establishment Size and Type, Summer 1991

Number of Establishments by Size and Lease Rate

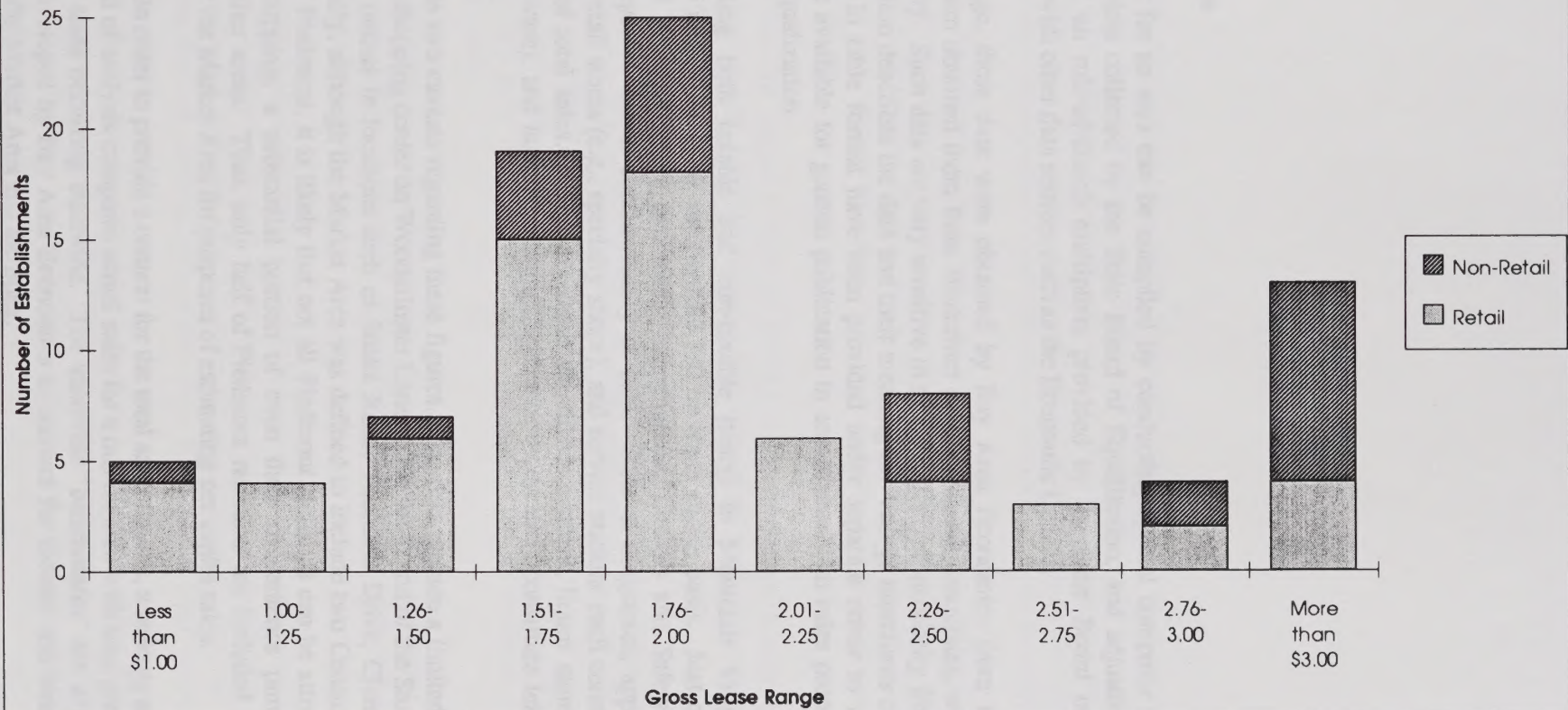
Lease Rate (Total per s.f.)	Spaces Smaller Than 1,000 s.f.				Spaces Larger Than 1,000 s.f.				TOTAL				Service Establishments	
	Non				Non				Non				Service	
	Storefronts		Storefronts		Storefronts		Storefronts		Storefronts		Storefronts		Estab. In	As % of All
	#	%	#	%	#	%	#	%	#	%	#	%	Storefronts	Storefronts
less than \$1.00	1	2%	1	3%	3	10%	4	6%	4	5%	5	5%	1	20%
\$1.00-1.25	9	16%	0	0%	3	10%	4	6%	12	14%	4	4%	0	0%
\$1.26-1.50	16	28%	1	3%	9	30%	6	9%	25	29%	7	7%	1	14%
\$1.51-1.75	14	25%	5	17%	2	7%	14	22%	16	18%	19	20%	4	21%
\$1.76-2.00	11	19%	12	41%	3	10%	13	20%	14	16%	25	27%	7	28%
\$2.01-2.25	3	5%	1	3%	6	20%	5	8%	9	10%	6	6%	0	0%
\$2.26-2.50	3	5%	4	14%	3	10%	4	6%	6	7%	8	9%	4	50%
\$2.51-2.75	0	0%	0	0%	0	0%	3	5%	0	0%	3	3%	0	0%
\$2.76-3.00	0	0%	0	0%	0	0%	4	6%	0	0%	4	4%	2	50%
more than \$3.00	0	0%	5	17%	1	3%	8	12%	1	1%	13	14%	9	69%
Total	57	100%	29	100%	30	100%	65	100%	87	100%	94	100%	28	30%

Note:

For establishments with lease terms which were other than for gross rents, the rent data were adjusted by the City of Oakland based on additional information collected from tenants and landlords regarding extra charges for which the tenants were responsible.

Sources: City of Oakland, Planning Department; Bay Area Economics.

Figure 2: Storefront Establishments by Lease Range



Current Retail Sales

Data for retail sales for an area can be compiled by conducting special computer analyses of taxable retail sales data collected by the State Board of Equalization, and adjusting for non-taxable items based on rule-of-thumb multipliers provided by the State Board or based on comparison of sales with other data sources such as the Economic Census.

For Montclair Village, these data were obtained by Bay Area Economics from the City of Oakland, which in turn obtained them from Hinterliter de Llamas and Associates, who compile these data for the City. Such data are very sensitive in terms of its confidentiality for individual stores; thus, this section describes the data and their meaning for Village merchants on a general basis. Actual data in table format have been provided under separate cover to the City of Oakland, but are not available for general publication in accordance with rules promulgated by the State Board of Equalization.

Retail sales (including both taxable and non-taxable items) in Montclair Village totaled approximately \$60.5 million in 1990, or about \$2,370 on a per capita basis. Just over half of these sales occurred at the Village's two major supermarkets, Lucky's and Safeway; precise figures cannot be reported due to confidentiality of data. Sales at drugstores, apparel stores, restaurants, "other" retail stores (e.g., specialty shops), and service stations each constitute about five to ten percent of total sales. Sales at general merchandise stores, liquor stores, building materials (e.g., hardware), and home furnishings/appliance stores each constitute less than five percent of total sales.

It is important to note two caveats regarding these figures. The data include a limited amount of sales from the small shopping center on Woodminster Lane, at the south end of the Study Area, as well as a few other outlets in locations such as Snake Road, Thornhill Drive, Clarewood, and Trestle Glen. Secondly, although the Market Area was defined to include two Census tracts that make up the City of Piedmont, it is likely that not all Piedmont residents can be attracted to the Village for their shopping; a substantial portion of even their convenience purchases will naturally occur in other areas. Thus, only half of Piedmont residents are included in the total population figure for the Market Area for purposes of estimating per capita sales.

Leakage Analysis. In order to provide a context for the total sales figures, a leakage analysis was conducted. This kind of analysis compares actual sales for a market area with total potential sales based on per capita sales occurring statewide. The statewide "benchmarks" are adjusted by a proprietary model developed by Bay Area Economics to account for income and household size differences between the Market Area and the State.

Comparing actual sales to potential sales yields "injections" (e.g., actual sales above estimated total potential sales) and "leakages" (e.g., sales below estimated total potential sales), given the incomes of a market area. Due to confidential data used for the leakage analysis, the underlying figures cannot be presented in this report. Table 7 presents the end point of the analysis - total leaking sales expressed as the percentages they represent of potential sales for Montclair.

For Montclair Village, the leakage analysis indicated that overall sales are "leaking" at a rate of 78 percent. In other words, although the area is experiencing actual sales of \$60.5 million, there is potential for almost \$278 million of sales, or \$10,900 per capita from the 25,523 residents of the market area. This high amount of leakage means that these potential sales are occurring elsewhere, not in the Village.

The three categories with the largest amounts of leaking sales are General Merchandise, Home Furnishings and Appliances, and Auto Dealers/Auto Supplies. In all three cases, all or almost all potential sales were not occurring in Montclair.

At the other end of the spectrum, Village grocery store sales represented about 78 percent of potential sales, for a leakage of only 22 percent. Given the relatively small sizes of both existing grocery stores, prohibiting the merchandising of the full inventory present at more modern-day supermarket facilities, this leakage rate is not excessive. Even in well-served neighborhoods, up to ten percent of grocery store sales typically occur outside of the local stores, due to food purchases away from home.

For drug stores, the leakage rate was approximately 47 percent, which is somewhat larger than what would be expected. Typical well-served neighborhood shopping districts will leak only 20 to 25 percent of these types of sales.

A category which shows substantial leakage, eating and drinking places (e.g., restaurants), is a surprise for Montclair Village. Although there were 23 businesses classified as eating and drinking places in 1990, they captured only 14 percent of potential sales. Typical well-served neighborhood shopping districts should capture at least 40 to 50 percent of these potential sales.

Apparel stores leaked 82 percent of potential sales in 1990. This is also unexpected, given the presence of several apparel stores in the Village, a characteristic not typically found in neighborhood centers. "Other Retail," which includes specialty and gift stores, leaked 86 percent for the Montclair Market Area. This finding is also unexpected, given the range of specialty stores present in the Village. However, this magnitude of leakage for specialty stores in most

Table 7. Leakage Analysis by Montclair Market Area, 1997

Market Area Category	Leakage as a Percent of Potential Sales(a)
General Store	100%
General Merchandise Store	71.07%
Drug Store (b)	147%
Food Store (c)	122%
Packaged Liquor Store	80%
Eating and Drinking Places	104%
Service Station (d)	71%

neighborhood centers is not atypical; neighborhood shopping areas do not usually contain many specialty stores. Since the Village has a relatively high concentration of this category, one would expect that more potential sales would be captured at them.

Packaged liquor stores showed an 80 percent leakage, while service stations showed a 71 percent leakage rate. For both of these categories, leakage can vary widely in typical neighborhood centers, depending on the availability of these types of outlets. In both cases, many neighborhoods do not seek to attract more facilities even if high leakage is occurring. Building materials also leaked substantially, with 87 percent of potential sales occurring outside of Montclair Village.

(a) Data were calculated by dividing the number of sales in the category by the number of potential sales in the category. The number of potential sales was calculated by multiplying the number of households in the market area by the number of potential sales per household. The number of potential sales per household was calculated by multiplying the number of households in the market area by the number of potential sales per household. The number of potential sales per household was calculated by multiplying the number of households in the market area by the number of potential sales per household. The number of potential sales per household was calculated by multiplying the number of households in the market area by the number of potential sales per household.

(b) Data were calculated by dividing the number of sales in the category by the number of potential sales in the category. The number of potential sales was calculated by multiplying the number of households in the market area by the number of potential sales per household. The number of potential sales per household was calculated by multiplying the number of households in the market area by the number of potential sales per household.

(c) Data were calculated by dividing the number of sales in the category by the number of potential sales in the category. The number of potential sales was calculated by multiplying the number of households in the market area by the number of potential sales per household. The number of potential sales per household was calculated by multiplying the number of households in the market area by the number of potential sales per household.

Source: 1997 Survey of Expenditures, U.S. Census Bureau; May Area Estimates.

Table 7: Leakage Analysis for Montclair Market Area, 1990

Retail Sales Category	Leakages as a Percent of Potential Sales(a)
Apparel Stores	(82%)
General Merchandise Stores	(100%)
Drug Stores (b)	(47%)
Food Stores (c)	(22%)
Packaged Liquor Stores	(80%)
Eating and Drinking Places	(86%)
Home Furnishings and Appliances	(99%)
Building Material and Farm Implements	(89%)
Auto Dealers and Auto Supplies	(99%)
Service Stations	(71%)
Other Retail Stores	(86%)
Total Retail Sales Leakage	(78%)

Notes:

(a) Potential sales have been estimated by BAE by category using a proprietary regression model. Statewide average per capita sales have been adjusted according to Montclair Area per capita income and average household size. Leakage is the total potential sales for the area less the total reported sales in the area. Total reported sales and total potential sales are not shown in this table due to the requirements of confidentiality regarding individual store sales. Per Capita Sales and leakage estimates include only residents of Montclair Census Tracts 4047,4046,4045.01,4045.02,4044, 4042; and one half of the residents of Piedmont Census Tracts 4261 and 4262.

(b) Data used to construct this table based on reported taxable sales. Drug Store taxable sales are assumed to constitute .67 of total sales.

(c) Data used to construct this table based on reported taxable sales. Grocery Store taxable sales are assumed to constitute .30 of total sales.

Sources: State Board of Equalization; U.S. Census; Bay Area Economics.

Current Shopping Patterns of Residents

Survey Methodology. To gain a better understanding of shopping patterns and attitudes of Montclair Village shoppers, a telephone survey was conducted in April, 1992 by Bay Area Economics. A geographically stratified sample of residents in Montclair and Piedmont was used for the survey (see Appendix A for Survey Instrument). In total, 352 calls were made and 100 surveys were completed, for an overall response rate of 28 percent. The 100 completed surveys represented 82 households from Montclair and 18 households from Piedmont. It is important to note that although the sample was selected to represent the proportion of Montclair to Piedmont households in the Market Area, a higher refusal rate by Piedmont households yielded slightly skewed results in terms of response rate by residential area.

A full tabulation of survey results is included as Appendix B.

Current Shopping Patterns. Most survey respondents (86 percent) made some kind of retail purchase at least three times a week, and 99 percent shopped at least once a week.

Not all of the shopping is occurring in the Village. Eight respondents do not shop in the Village at all, including 5 out of the 18 Piedmont respondents. Only 9 respondents shop in the Village every day (as compared to 29 respondents who shop somewhere every day), and only 49 respondents shop in the Village three times a week or more (as compared to 86 respondents who shop somewhere this often). Thus, interestingly, a large number of respondents are doing their convenience shopping elsewhere at least some of the time, suggesting that the Village could potentially attract more sales from existing shoppers who are currently going elsewhere to make some of their weekly purchases.

Major grocery store shopping was the primary purchase which brought respondents to Montclair Village. Approximately 90 percent of the households which shop at Montclair Village come most frequently for groceries. When asked what other type of purchase frequently brought these shoppers to Montclair Village, top responses included drug stores (17 percent), restaurants (12 percent), video stores (8 percent) and banks (8 percent).

To determine where shoppers were making various purchases, respondents were asked where they most frequently bought groceries and clothing, and where they most often dined out. Responses are outlined below.

Groceries. Eighty percent of the households responding (98 household answered this survey question) reported that they bought groceries primarily in Montclair Village; the two major

grocery stores in Montclair (Lucky's and Safeway) were where 78 percent shopped most frequently, with an additional two percent reporting they most frequently shopped for groceries at Montclair Produce.

A greater proportion of Montclair residents (89 percent) shopped most frequently for groceries in Montclair Village than residents of Piedmont (50 percent). In Piedmont, three of 18 survey respondents shopped for groceries most frequently at the Safeway on Grand Avenue and three of 18 shopped at the Rockridge Safeway. In contrast, only four of eighty Montclair respondents most often shopped at the Rockridge Safeway, and no Montclair residents reported the Grand Avenue Safeway as their most frequently visited grocery store.

Respondents were also asked their second most frequent place for grocery shopping; this question was included to obtain a sense of strong secondary competition to the Village. In addition to selecting the other major store in the Village (e.g., Safeway respondents went to Lucky's and visa versa), the Rockridge Safeway was the next most often mentioned. Thus, this suggests that although the Montclair grocery stores are capturing a high degree of sales, some grocery purchases that could be captured in the Village are occurring outside the area.

This was confirmed by another survey question regarding reasons for shopping elsewhere for groceries. The primary reason survey respondents from both Montclair and Piedmont (a total of 20 responses) shopped outside of Montclair for groceries was the greater variety of goods available elsewhere (6 responses or 30 percent) and convenient location to home or work (5 responses or 25 percent).

Clothing. Survey respondents shop most frequently for clothing in San Francisco (25 percent) and Walnut Creek (21 percent). Montclair Village was only chosen by 10 percent of survey respondents as the most frequent location for clothes shopping, with another 6 percent shopping there as a second choice. Other shopping areas frequently mentioned as a second choice for clothing purchases included Walnut Creek (17 percent), Downtown Oakland (11 percent) and Bay Fair Mall (11 percent). The primary reasons most households shopped outside of Montclair for clothing were the variety of goods available (52 percent) and convenient location to home or work (14 percent).

Dining Out. The largest proportion of respondents most frequently dined out in Montclair Village (28 percent). Other areas included San Francisco (12 percent), Piedmont Avenue (10 percent) and Oakland's Chinatown (8 percent). Many households did not have an alternate area in which they dined out (20 households). Of those households which did have a second response, 15 percent frequented restaurants on Piedmont Avenue, 12 percent in Montclair, and 12 percent in

Berkeley. Households responding that they dined outside of Montclair Village did so for the quality of restaurants (27 percent) and variety of restaurants available (24 percent).

Summary of Current Retail Activity

Montclair Village had approximately \$60.5 million in retail sales in 1990. These sales occurred in a relatively healthy real estate environment; only 4.9 percent of commercial space was vacant according to a 1991 inventory conducted by the City of Oakland. This low vacancy rate, coupled with relatively high rents for retail space, indicates that merchants in Montclair recognize the strong sales potential offered by the exceptional demographics and pleasant atmosphere of the Village and its surrounding residential areas.

Sales were dominated by grocery and other convenience goods. A leakage analysis, comparing actual sales against potential sales for the Market Area indicates that the Village is not the location for most purchases made by Market Area neighborhood residents; overall, 78 percent of possible sales were "leaking" outside the Village. While neighborhood shopping districts like the Village generally do not capture all potential sales, this overall leakage is considered high, and suggests that additional sales from surrounding residents could occur in the Village if appropriate retail goods are offered and merchandising strategies are followed.

Grocery stores and drugstores appear to be capturing close to the level of sales that are typically found in neighborhood shopping centers.

The categories for which lower sales relative to other market areas were actually captured by the Village include restaurants, apparel, specialty goods, general merchandise, and home furnishings/appliances.

A survey of residents in Montclair and Piedmont indicated that grocery stores were the major draw to the Village. Montclair residents made their primary grocery purchases in the Village to a greater degree than Piedmont residents, suggesting a possible strategy for attracting additional shoppers. The main reasons why shoppers did not come to the Village to buy their groceries were the lack of variety and greater convenience of other grocery stores.

Although substantial numbers of respondents did eat out in the Village, there were also substantial numbers who frequently dined elsewhere. Quality and variety of restaurants in other locations were the most often cited reasons for the respondents selections. The low capture rate of potential sales for restaurants in the Village (only 17 percent) suggests that this category could also enhance its sales with the addition of facilities targeted and marketed to local residents.

Only 10 percent of respondents cited the Village as their most frequent location for clothing purchases. Instead, residents were shopping in San Francisco, Walnut Creek, and elsewhere due to greater variety and more convenience.

THE VILLAGE'S RETAIL PERFORMANCE

This section evaluates the health of the Montclair Area retail sector from three perspectives. First, data are presented which show the volume of sales in the Montclair Area in comparison to sales volumes in other nearby cities on a total as well as on a per capita basis.

The second aspect of this analysis examines the Montclair Market Area's retail sales growth trends in comparison to other communities. Regardless of the absolute level of sales in the Montclair Area, it is also important to be aware of the trend in sales over time. This information can be instructive as to whether retail sales are keeping pace with inflation and population growth in the Market Area, and whether the area is losing or gaining ground in comparison to other nearby communities.

The third type of performance measure presented in this section compares average sales per square foot for stores in the Village with industry averages for the U.S. This comparison allows identification of those store types that could improve their sales in existing facilities as opposed to constructing new stores or changing the retail mix.

Comparative Per Capita Taxable Retail Sales

Table 8 and Figure 3 show 1990 per capita taxable retail sales for Montclair Village compared to Lafayette, Moraga, Orinda, San Anselmo, and San Carlos. These cities were selected for comparison to Montclair because they are similar in terms of demographics, size, and retail base. All areas are composed primarily of mid- to high-income households, and none of the cities have regional malls which could lead to extraordinarily high per capita sales.

To further control for differences in the retail bases of the areas, San Carlos' and Lafayette's taxable retail sales were adjusted to reduce the effect of auto sales on per capita sales. It is important to note that all comparisons were made on taxable sales only, due to the way data are published by the State.

Among the areas shown, Montclair had the lowest per capita taxable sales in 1990, at \$1,371 per resident. This is substantially less than the next lowest figures, which were \$2,563 per capita in Orinda and \$2,828 in Moraga. Lafayette, which is smaller than the Montclair Area by about 2,000 persons had 382 more retail permits and per capita sales which were almost \$3,400 higher in 1990. San Anselmo had sales on the same order of magnitude as Lafayette, with \$4,146 per

Table 4. Taxable Sales Per Capita, Various Retail Sales, 1998

	1998 Population	1998 Total Taxable Sales	1998 Per Capita Taxable Sales	Per Capita Total Taxable Sales
Montclair	20,200	2,000,000	\$9,900	\$9,900
Orinda	20,000	2,000,000	\$10,000	\$10,000
Moraga	15,000	1,500,000	\$10,000	\$10,000
San Carlos	15,000	1,500,000	\$10,000	\$10,000
San Ramon	15,000	1,500,000	\$10,000	\$10,000
San Jose	15,000	1,500,000	\$10,000	\$10,000
San Francisco	15,000	1,500,000	\$10,000	\$10,000

capita, while San Carlos outperformed all of the communities analyzed with taxable sales of over \$7,500 per person.

These data show that given the population in the Montclair Market Area, the performance of the retail base is weak. This finding corresponds with the leakage analysis described previously, and provides a sense of the sales goals that the Village could achieve. For example, if the Village were performing as well as Orinda/Moraga on a per resident basis, taxable sales in the Village would be double their current level.

Table 8: Comparative Per Capita Taxable Retail Sales, 1990

	<u>1990 Population</u>	<u># of Permits</u>	<u>Total 1990 Taxable Retail Sales</u>	<u>Per Capita 1990 Taxable Retail Sales</u>
Montclair(a)	25,523	184	\$34,972,694	\$1,370
Lafayette(b)	23,501	566	\$111,854,217	\$4,760
Moraga	15,852	233	\$44,825,000	\$2,828
Orinda	16,642	267	\$42,653,000	\$2,563
San Anselmo	11,743	241	\$48,692,000	\$4,146
San Carlos(c)	26,167	375	\$198,428,773	\$7,583

Note:

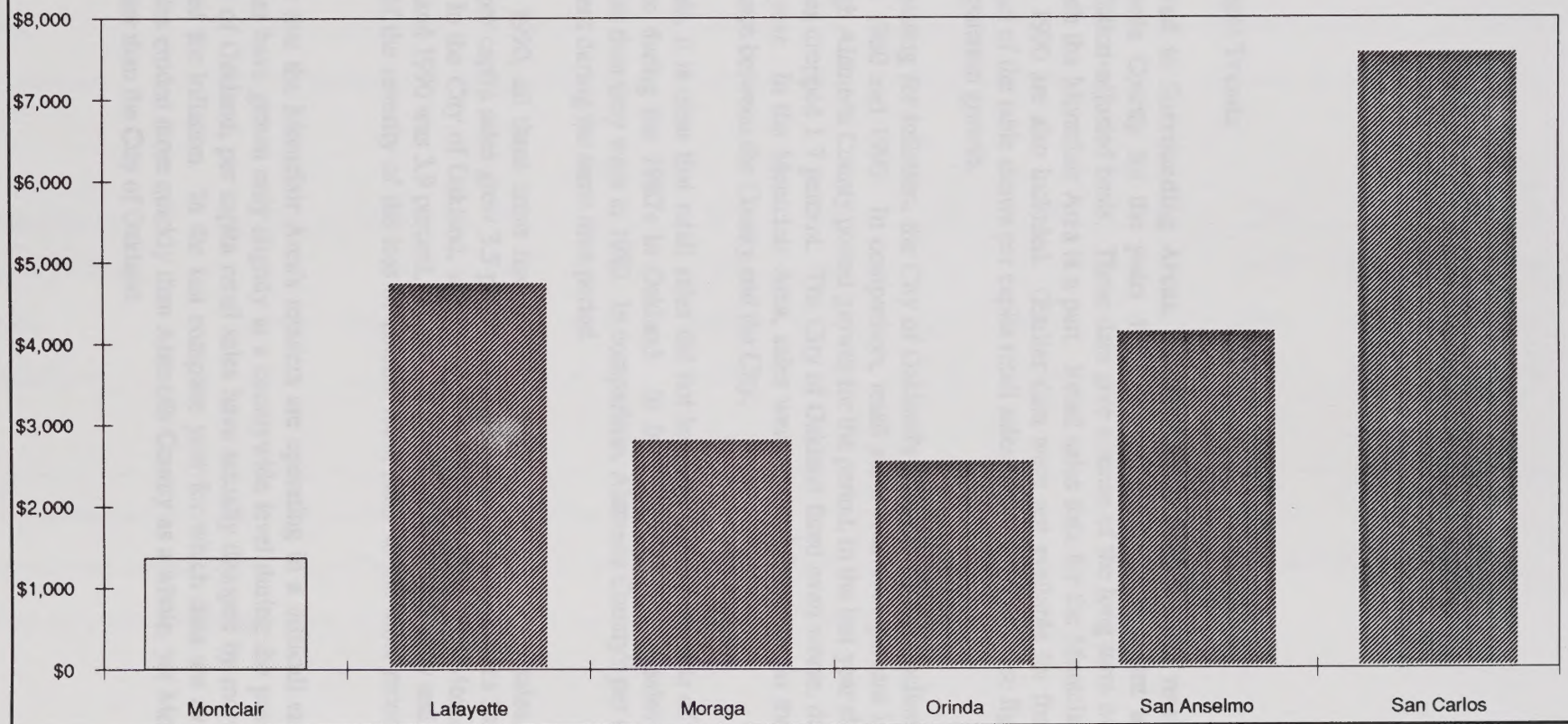
(a) Montclair Area includes Montclair Census Tracts 4042,4044,4045.01,4045.02,4046, 4047; and fifty percent of the populations from Piedmont Census tracts 4261 and 4262.

(b) Lafayette's retail sales have been adjusted in order to compensate for the effect of auto sales on total sales figures. Total sales in the Auto Dealers and Auto Parts category are reduced according to the percentage of sales in this category contributed by Auto Dealers.

(c) San Carlos' retail sales have been adjusted in order to compensate for the effect of auto sales on total sales figures. Total sales in the Auto Dealers and Auto Parts category are reduced according to the percentage of sales in this category contributed by Auto Dealers.

Sources: State Board of Equalization; Hinterliter de Llamas and Associates; State Census Data Center; Bay Area Economics.

Figure 3: Per Capita Taxable Retail Sales, 1990



Historical Retail Sales Trends

Montclair Compared to Surrounding Areas. Table 9 shows total taxable retail sales for Oakland and Alameda County for the years 1980 through 1990 (most recent annual data available) on an inflation-adjusted basis. These data give a sense of the long term overall retail environment of which the Montclair Area is a part. Retail sales data for the Montclair Area for the years 1989 and 1990 are also included. (Earlier data were not available for the Montclair Area.) The lower part of the table shows per capita retail sales for three areas; these figures adjust for the effects of population growth.

As shown, after adjusting for inflation, the City of Oakland's total retail sales declined by about 18 percent between 1980 and 1990. In comparison, retail sales rose 19.4 percent in Alameda County. Even though Alameda County posted growth for the period, in the last year shown, 1989 to 1990, County sales dropped 1.7 percent. The City of Oakland fared even worse, dropping 5.8 percent in the last year. In the Montclair Area, sales were down 3.7 percent in the last year, placing its performance between the County and the City.

On a per capita basis, it is clear that retail sales did not keep up with the effects of population growth and inflation during the 1980's in Oakland. In fact, Oakland's retail sales were 25.2 percent lower in 1990 than they were in 1980. In comparison, Alameda County's per capita sales were up by 3.5 percent during the same time period.

Between 1989 and 1990, all three areas have suffered declines in per capita sales. Whereas Alameda County's per capita sales grew 3.5 percent between 1980 and 1990, sales have actually fallen 2.7 percent. In the City of Oakland, sales were down 6.4 percent. The Montclair Area's drop between 1989 and 1990 was 3.9 percent, placing it between Alameda County and the City of Oakland, in terms of the severity of the loss of taxable retail sales in the most recent complete year.

These data indicate that the Montclair Area's retailers are operating in a difficult environment. Per capita retail sales have grown only slightly at a countywide level during the past ten years, and within the City of Oakland, per capita retail sales have actually dropped by more than one-fourth when adjusted for inflation. In the last complete year for which data are available, the Montclair Area's sales eroded more quickly than Alameda County as a whole, yet Montclair still managed to fare better than the City of Oakland.

Table 9: Historic Taxable Retail Sales Trends for Montclair, Oakland, and Alameda County

Retail Sales (\$1,000s) Inflation Adjusted												% Change 1989-1990	% Change 1980-1990
	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990		
Montclair Area(a)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	\$37,935	\$36,523	-3.72%	n.a.
Oakland	\$2,092,854	\$1,924,699	\$1,757,301	\$1,886,467	\$2,001,698	\$1,960,153	\$1,893,241	\$1,824,557	\$1,832,631	\$1,822,987	\$1,716,910	-5.82%	-17.96%
Alameda County	\$6,983,370	\$6,578,803	\$6,332,095	\$7,075,759	\$7,676,321	\$7,918,812	\$7,958,720	\$8,069,837	\$8,221,016	\$8,476,963	\$8,335,859	-1.66%	19.37%
Per Capita Sales Inflation Adjusted												% Change 1989-1990	% Change 1980-1990
	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990		
Montclair Area(a)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	\$1,489	\$1,431	-3.91%	n.a.
Oakland	\$6,167	\$5,610	\$5,059	\$5,345	\$5,594	\$5,432	\$5,216	\$4,979	\$4,984	\$4,927	\$4,611	-6.42%	-25.23%
Alameda County	\$6,318	\$5,886	\$5,584	\$6,143	\$6,559	\$6,680	\$6,594	\$6,611	\$6,618	\$6,721	\$6,539	-2.71%	3.51%

Notes:

Retail sales data were not compiled for the Montclair Area for years prior to 1989.

(a) Montclair Area includes Montclair Census Tracts 4042,4044,4045.01,4045.02,4046, 4047; and fifty percent of the populations from Piedmont Census tracts 4261 and 4262.

Sources: State Board of Equalization; State Census Data Center; U.S. Department of Commerce; Bay Area Economics.

Table 10: Comparative Total Sales (in \$ mil) for Selected Cities, 1988-1991

Community	Fiscal Year 1988/89		Fiscal Year 1990/91		Change
	Total Sales	Per Capita	Total Sales	Per Capita	
Montclair	\$14,372,000	254	\$14,770,000	257	+3.1%
Lafayette	\$12,000,000	245	\$11,200,000	239	-6.7%
Moraga	\$10,000,000	230	\$10,400,000	234	+4.0%
Orinda	\$10,000,000	230	\$10,400,000	237	+3.0%
San Anselmo	\$10,000,000	230	\$8,800,000	224	-11.5%
San Carlos	\$10,000,000	230	\$10,400,000	238	+4.0%

Montclair Compared with Similar Communities. A comparison of recent sales trends was also conducted for Montclair and the five other similar communities discussed above (Lafayette, Moraga, Orinda, San Anselmo, and San Carlos). Due to the way statistics are published by the State Board of Equalization, a different time period for this analysis was used than for the comparisons with Oakland and Alameda County; to compare to other small cities, changes in sales between the fiscal years of 1988/89 and 1990/91 were analyzed.

As shown on Table 10, total Montclair sales rose 1.15 percent on an inflation-adjusted basis. Two of the other cities, Lafayette and San Anselmo, experienced substantial declines for the period (-4.36 and -11.55 percent, respectively). Moraga, Orinda, and San Carlos, however, all experienced increases in sales, ranging from 3.12 to 9.43 percent for the period. On a per capita basis, the same pattern of "winners" and "losers" emerges. Thus, while Montclair sales are low on a per capita basis compared to these other communities, its recent trend of sales has been modestly positive relative to similar communities.

Table 10: Comparative Taxable Retail Sales Trends for Selected Cities, 1988-1991

Taxable Retail Sales (Inflation Adjusted to 90/91 Dollars)	Fiscal Year 1988/1989		Fiscal Year 1990/1991		% Change 88/89-90/91
	Total Taxable	# of	Total Taxable	# of	
	Retail Sales	Permits	Retail Sales	Permits	
Montclair	\$34,572,502	184	\$34,968,600	184	1.15%
Lafayette	\$123,784,752	472	\$118,387,000	563	-4.36%
Moraga	\$45,777,732	205	\$47,208,000	234	3.12%
Orinda	\$38,550,876	209	\$41,431,000	257	7.47%
San Anselmo	\$55,388,424	239	\$48,992,000	244	-11.55%
San Carlos	\$191,048,676	370	\$209,067,000	373	9.43%

Per Capita Retail Sales (Inflation Adjusted to 90/91 Dollars)	Fiscal Year 1988/1989		Fiscal Year 1990/1991		% Change 88/89-90/91
	Total Taxable	# of	Total Taxable	# of	
	Retail Sales	Permits	Retail Sales	Permits	
Montclair	\$1,357	184	\$1,367	184	0.75%
Lafayette	\$5,378	472	\$5,046	563	-6.17%
Moraga	\$2,892	205	\$2,952	234	2.09%
Orinda	\$2,324	209	\$2,487	257	7.00%
San Anselmo	\$4,765	239	\$4,156	244	-12.79%
San Carlos	\$7,430	370	\$7,945	373	6.93%

Note:

The State Census Data Center does not prepare annual population estimates for sub-city areas such as Montclair. Montclair area 1989 and 1991 Montclair Area populations estimates are based on the average annual population growth in the Montclair Area between the 1980 and 1990 census.

Sources: State Board of Equalization; U.S. Bureau of Labor Statistics; State Census Data Center; Bay Area Economics.

Table 11: Sales Per Square Foot by Category in Montclair Shopping District

Store Category (s)	Standard Performance Qualitative Industry Relative (s)	Typical Sales Per Square Foot (s)
Drugstore	++	1200
Drugstore	++	1200
Food Store	++	1200
Alcohol Store	++	1200
Eating and drinking (s)	+	1100
Home furnishings and appliances	+	1100
Apparel	+	1100
Building materials	+	1100
Other retail	+	1100

Sales Per Square Foot

Another way to evaluate Montclair Village's sales performance is to look at retail sales per square foot of space compared to industry averages. This type of analysis was conducted for the Village based on information collected by the City of Oakland regarding square feet of store space and retail sales in the summer of 1991. The results are displayed on Table 11. To protect the confidential nature of the data underlying this analysis, performance is only broadly categorized with respect to industry standards. Sales are categorized as being "far below average" (less than two-thirds of typical sales), "below average" (less than typical sales but not less than two-thirds of typical sales), "above average" (more than typical sales but not more than 1.33 times typical sales), or "far above average" (more than 1.33 times typical sales).

As indicated, some categories of stores in the Village are generating relatively high sales, while others are not performing as well as industry averages for the U.S., based on data published by the Urban Land Institute for community shopping centers. Eating and drinking establishments are performing far below average, and liquor and home furnishings/appliances are performing below average. Apparel, building materials and other retail are performing above average, and the drugstore and food store categories are performing far above average. General merchandise stores were not evaluate since there are no existing sales in this category in Montclair. It should be noted that automobile, automotive supply, and service station sales have been excluded from this analysis.

Table 10. Comparison of the results of the two methods for the two cases.

Case	Method 1		Method 2	
	Time (min)	Memory (MB)	Time (min)	Memory (MB)
Case 1	1.2	1.5	1.2	1.5
Case 2	1.2	1.5	1.2	1.5
Case 3	1.2	1.5	1.2	1.5
Case 4	1.2	1.5	1.2	1.5
Case 5	1.2	1.5	1.2	1.5
Case 6	1.2	1.5	1.2	1.5
Case 7	1.2	1.5	1.2	1.5
Case 8	1.2	1.5	1.2	1.5
Case 9	1.2	1.5	1.2	1.5
Case 10	1.2	1.5	1.2	1.5
Case 11	1.2	1.5	1.2	1.5
Case 12	1.2	1.5	1.2	1.5
Case 13	1.2	1.5	1.2	1.5
Case 14	1.2	1.5	1.2	1.5
Case 15	1.2	1.5	1.2	1.5
Case 16	1.2	1.5	1.2	1.5
Case 17	1.2	1.5	1.2	1.5
Case 18	1.2	1.5	1.2	1.5
Case 19	1.2	1.5	1.2	1.5
Case 20	1.2	1.5	1.2	1.5
Case 21	1.2	1.5	1.2	1.5
Case 22	1.2	1.5	1.2	1.5
Case 23	1.2	1.5	1.2	1.5
Case 24	1.2	1.5	1.2	1.5
Case 25	1.2	1.5	1.2	1.5
Case 26	1.2	1.5	1.2	1.5
Case 27	1.2	1.5	1.2	1.5
Case 28	1.2	1.5	1.2	1.5
Case 29	1.2	1.5	1.2	1.5
Case 30	1.2	1.5	1.2	1.5
Case 31	1.2	1.5	1.2	1.5
Case 32	1.2	1.5	1.2	1.5
Case 33	1.2	1.5	1.2	1.5
Case 34	1.2	1.5	1.2	1.5
Case 35	1.2	1.5	1.2	1.5
Case 36	1.2	1.5	1.2	1.5
Case 37	1.2	1.5	1.2	1.5
Case 38	1.2	1.5	1.2	1.5
Case 39	1.2	1.5	1.2	1.5
Case 40	1.2	1.5	1.2	1.5
Case 41	1.2	1.5	1.2	1.5
Case 42	1.2	1.5	1.2	1.5
Case 43	1.2	1.5	1.2	1.5
Case 44	1.2	1.5	1.2	1.5
Case 45	1.2	1.5	1.2	1.5
Case 46	1.2	1.5	1.2	1.5
Case 47	1.2	1.5	1.2	1.5
Case 48	1.2	1.5	1.2	1.5
Case 49	1.2	1.5	1.2	1.5
Case 50	1.2	1.5	1.2	1.5
Case 51	1.2	1.5	1.2	1.5
Case 52	1.2	1.5	1.2	1.5
Case 53	1.2	1.5	1.2	1.5
Case 54	1.2	1.5	1.2	1.5
Case 55	1.2	1.5	1.2	1.5
Case 56	1.2	1.5	1.2	1.5
Case 57	1.2	1.5	1.2	1.5
Case 58	1.2	1.5	1.2	1.5
Case 59	1.2	1.5	1.2	1.5
Case 60	1.2	1.5	1.2	1.5
Case 61	1.2	1.5	1.2	1.5
Case 62	1.2	1.5	1.2	1.5
Case 63	1.2	1.5	1.2	1.5
Case 64	1.2	1.5	1.2	1.5
Case 65	1.2	1.5	1.2	1.5
Case 66	1.2	1.5	1.2	1.5
Case 67	1.2	1.5	1.2	1.5
Case 68	1.2	1.5	1.2	1.5
Case 69	1.2	1.5	1.2	1.5
Case 70	1.2	1.5	1.2	1.5
Case 71	1.2	1.5	1.2	1.5
Case 72	1.2	1.5	1.2	1.5
Case 73	1.2	1.5	1.2	1.5
Case 74	1.2	1.5	1.2	1.5
Case 75	1.2	1.5	1.2	1.5
Case 76	1.2	1.5	1.2	1.5
Case 77	1.2	1.5	1.2	1.5
Case 78	1.2	1.5	1.2	1.5
Case 79	1.2	1.5	1.2	1.5
Case 80	1.2	1.5	1.2	1.5
Case 81	1.2	1.5	1.2	1.5
Case 82	1.2	1.5	1.2	1.5
Case 83	1.2	1.5	1.2	1.5
Case 84	1.2	1.5	1.2	1.5
Case 85	1.2	1.5	1.2	1.5
Case 86	1.2	1.5	1.2	1.5
Case 87	1.2	1.5	1.2	1.5
Case 88	1.2	1.5	1.2	1.5
Case 89	1.2	1.5	1.2	1.5
Case 90	1.2	1.5	1.2	1.5
Case 91	1.2	1.5	1.2	1.5
Case 92	1.2	1.5	1.2	1.5
Case 93	1.2	1.5	1.2	1.5
Case 94	1.2	1.5	1.2	1.5
Case 95	1.2	1.5	1.2	1.5
Case 96	1.2	1.5	1.2	1.5
Case 97	1.2	1.5	1.2	1.5
Case 98	1.2	1.5	1.2	1.5
Case 99	1.2	1.5	1.2	1.5
Case 100	1.2	1.5	1.2	1.5

Table 11: Sales Per Square Foot of Space in Selected Business District

Store Categories (a)	Overall Performance	Typical Sales
	Relative to Industry Standards (b)	Per Square Foot (c)
Apparel	+	120%
Drugstore	++	140%
Food Store	++	140%
Liquor Store	-	70%
Eating and Drinking	-	60%
Home and Home Furnishings	-	70%
Automobile	-	0%
Automotive Supply	-	0%
Service Station	-	0%

Sales Per Square Foot

Another way to evaluate Montclair Village's sales performance is to look at retail sales per square foot of space compared to industry averages. This type of analysis was conducted for the Village based on information collected by the City of Oakland regarding square feet of store space and retail sales in the summer of 1991. The results are displayed on Table 11. To protect the confidential nature of the data underlying this analysis, performance is only broadly categorized with respect to industry standards. Sales are categorized as being "far below average" (less than two-thirds of typical sales), "below average" (less than typical sales but not less than two-thirds of typical sales), "above average" (more than typical sales but not more than 1.33 times typical sales), or "far above average" (more than 1.33 times typical sales).

As indicated, some categories of stores in the Village are generating relatively high sales, while others are not performing as well as industry averages for the U.S., based on data published by the Urban Land Institute for community shopping centers. Eating and drinking establishments are performing far below average, and liquor and home furnishings/appliances are performing below average. Apparel, building materials and other retail are performing above average, and the drugstore and food store categories are performing far above average. General merchandise stores were not evaluate since there are no existing sales in this category in Montclair. It should be noted that automobile, automotive supply, and service station sales have been excluded from this analysis.

Table 11: Sales Per Square Foot by Category in Montclair Business District

Store Category (a)	Montclair Performance Relative to Industry Standard (b)	Typical Sales Per Square Foot(c)
Apparel(d)	-	\$265
Drugstores	++	\$330
Food Stores(e)	++	\$480
Liquor Stores	-	\$340
Eating and Drinking(f)	--	\$260
Home Furnishings and Appliances(g)	-	\$250
Building Materials/Farm Implements(h)	+	\$170
Other Retail	+	\$250

Notes:

(a) Automotive/auto supplies and service stations are excluded from this analysis.

(b) Due to disclosure rules, average sales per square foot are not presented. The performance ratings are as follows:

- Actual sales less than two-thirds of typical sales.
- Actual sales less than typical sales, but not less than two-thirds of typical sales
- + Actual sales more than typical sales, but not more than 1.33 times typical sales
- ++ Actual sales more than 1.33 times typical sales

(c) Figures are from ULI, Dollars & Cents, 1990 for U.S. community centers, top 10 percent.

(d) Apparel sales are based on sales in women's specialty stores.

(e) Typical Food Stores sales are based on sales in supermarkets.

(f) Typical Eating and Drinking establishment sales based on sales for restaurants without liquor.

(g) Typical Home Furnishings/Appliances sales are based on figures for appliance stores.

(h) Typical Building Materials/Farm Implements sales are based on figures for Paint and Wallpaper stores.

Sources: City of Oakland, Planning Department; Urban Land Institute, Dollars and Cents of Shopping Centers, 1990; Bay Area Economics.

Summary of the Village's Retail Sales Performance

The analysis of the Village's retail sales performance indicates that the Village is not achieving sales levels comparable to other similar communities. However, the modest base of sales in the Village is not on a downward trend; in fact, the Village is weathering the recent recession better than Oakland as a whole, Lafayette, or San Anselmo. While Montclair did lose sales due to the recession between 1990 and 1991, it is likely that these sales will recover as the general economy improves.

Some of the existing stores in the Village appear to be performing relatively well compared to national averages. In particular, grocery, drug, and specialty stores exceed expected sales on a per square foot basis. However, apparel, restaurants, and home furnishings are not performing as well as these types of stores elsewhere in the U.S., indicating the need for strategies to enhance sales in existing facilities.

Survey Responses Related to Retail Performance

The resident survey conducted for this Study asked respondents why they shopped elsewhere for some of their basic retail purchases and/or did not shop in the Village at all. As previously described, respondents shopped elsewhere for groceries and apparel to find greater variety. They frequented restaurants away from the Village to find greater quality and variety.

The survey also asked respondents about what two improvements could be made to encourage them to shop at the Village more often. A total of 139 responses other than "satisfied" were received to this set of questions; they have been aggregated below to allow for ease of analysis. It is important to note that these responses were unsolicited; the surveyors simply wrote down whatever the respondent stated.

Parking. The most often-cited answer to this question was to provide more convenient parking; this item represented over 38 percent of all responses.

Answers to the questions regarding ways to improve the Village to encourage shopping were cross-tabulated by the frequency of shopping in Montclair in order to establish responses for those who shop infrequently or not at all in the Village. For the eight respondents who do not shop at all in the Village, six of them cited more convenient parking as the improvement that could encourage them to shop; the other two cited an improvement in the retail mix. Of the additional nine respondents who shop in Montclair Village less than once a week, five also cited more convenient parking as their most desired improvement.

THE POTENTIAL FOR ADDITIONAL RETAIL SALES

It is interesting to note, however, that while parking was the most frequent answer to the "wish list" of what could be done in the Village to encourage more shopping, parking was barely cited by respondents as the reason they go elsewhere for groceries, apparel, and restaurants. Thus, the issue of parking should be kept in perspective; it is likely that while the parking situation in the Village is a concern for many shoppers, it is not the primary reason they go elsewhere for their shopping.

Improve Retail Mix. The second most frequent answer to the question regarding improvements to the Village to encourage shopping was "improving the retail mix." Seventeen percent of all answers were to improve the retail mix. This answer was given by three out of the six respondents who never shop at the Village, and by three of the five respondents who shop less than once a week.

Decrease Non-Retail at Ground Floor. Out of the 139 total responses, 13, or nine percent, cited "less offices at ground level" as a way to encourage them to shop more often in the Village. This response is interesting in that it indicates the moderate degree of sensitivity of Montclair shoppers to the mix of service versus retail businesses as they walk through the shopping district, especially since this item was not mentioned by the surveyor.

Other Ways to Encourage More Shopping. A variety of other responses were received to this question, although none of them were as frequent as those described above. Other ways to encourage more shopping included lower prices, later business hours, better customer service, change in visual appearance, and better security.

As shown on Table 12, append 2, the survey results for the Village show all potential areas for additional sales, based on a comparison of actual sales per square foot with the city average. Strategies to increase sales in these levels are described in the Recommendations section of the report.

Additional Sales at Five Stores

The categories that could support new stores include dry goods, food stores, home stores, restaurants, health furnishings/appliances, banking services, and "other retail." Table 13 also includes the amount of square feet that could be supported by these new store types.

All of the sources of potential sales could be supported by existing space within. Of course, to effect the increase, changes in merchandising and presentation would need to occur.

THE POTENTIAL FOR ADDITIONAL RETAIL SALES

Table 12 presents a quantitative approach to determining the amount of sales which could be captured at existing stores as well as the amount of new store space which could be added to the Village by store category. Again, due to the confidentiality of data on which some of these findings are based, only the end result of the estimates can be presented on Table 12.

As shown, an estimated additional \$33.0 million in retail sales could be captured by the Village, given an appropriate retail mix, improved parking, enhanced marketing, and stronger promotional activities. Of the total additional capturable sales, an estimated \$6.6 million could occur in existing outlets. The balance, an estimated \$25.4 million, could occur in new stores.

These estimates were derived by increasing existing sales up to a percent of total purchases made by residents that could realistically occur in a neighborhood shopping center with some community shopping center store types (e.g., the Village). For each store category, not all possible sales could be expected to be captured locally. Convenience goods like grocery and drugstore purchases, can expect to be made to a large extent at a convenient neighborhood center. However, purchases such as apparel are made primarily in larger shopping centers such as regional malls, where shoppers can compare among a selection of stores. For example, a shopping district like the Village can only expect to reasonably capture up to 40 percent of total potential apparel purchases.

Additional Sales at Existing Stores

As shown on Table 12, apparel stores that currently exist in the Village could all probably absorb additional sales, based on a comparison of actual sales per square foot with industry averages. Strategies to increase sales to these levels are described in the Recommendations section of this report.

Additional Sales at New Stores

The categories that could support new stores include drugstores, food stores, liquor stores, restaurants, home furnishings/appliances, building materials, and "other retail." Table 12 also indicates the amount of square feet that could be supported by these new store sales.

All of the increase of apparel sales could be absorbed by existing square footage. Of course, to effect this increase, changes in merchandising and promotion would need to occur.

Although the drugstore category could support a new store of about 7,800 square feet, it is unlikely that this category of store could be attracted to the Village, given the strong competition offered by the Thrifty's Junior and the new Long's.

The additional space for grocery sales will be absorbed by the Lucky's expansion. However, since the Village does not have a strong concentration of specialty food stores, and many residents would like to see more of these (see discussion below), additional smaller specialty food stores could also probably succeed in the Village. From a quantitative standpoint, sales support for these smaller stores would probably come from a decrease in existing grocery store sales, which are exceptionally high on a per square foot basis (\$750) as compared to industry standards (\$480).

Some of the best opportunities for new stores are in the restaurant and "other retail" groups; Table 12 shows market support for an additional two to three restaurants (in addition to the Lone Star Cafe now opening in the Village), assuming that they range from 2,000 to 3,000 square feet each. For the "other retail" category, approximately 10 new stores could be supported, assuming an average of 3,000 square feet per store. One or two new stores offering home furnishings could also be supported in the Village; however, the location and inaccessibility to through traffic may discourage the kinds of home furnishings stores that have been adding new stores in other parts of the Bay Area.

These estimates suggest the potential for several new stores in the Village. However, it is important to note that the Village is somewhat constrained by a lack of space in which to locate these facilities. However, given the large number of ground floor non-retail occupants such as banks and realty offices, these findings suggest a scenario where, over time, attrition of the non-retail spaces could offer opportunities for new retail stores.

Table 12: Additional Supportable Square Feet of Retail Space In Montclair

Retail Sales Category	Additional Capturable Sales	Capturable In Existing Outlets	Capturable In New Outlets	Typical Sales Per S.F. (a)	Potential New Store Area
Apparel Stores	\$4,230,016	\$3,256,845	\$0	\$265	0
General Merchandise Stores	\$0	n.a.	\$0	\$140	0
Drug Stores (b)	\$2,576,270	\$0	\$2,576,270	\$330	7,807
Food Stores (c)	\$5,106,359	\$0	\$5,106,359	\$480	10,638 (d)
Packaged Liquor Stores	\$1,956,950	\$140,600	\$1,816,350	\$340	5,342
Eating and Drinking Places	\$6,012,672	\$2,949,126	\$3,063,546	\$260	11,783
Home Furnishings and Appliances	\$3,622,162	\$264,650	\$3,357,512	\$250	13,430
Building Material and Farm Implements	\$1,290,998	\$0	\$1,290,998	\$170	7,594
Other Retail Stores	\$8,240,766	\$0	\$8,240,766	\$250	32,963
Total Retail Stores (e)	\$33,036,193	\$6,611,221	\$25,451,801	-	89,557

Note:

(a) Sales per square foot figures are from the Urban Land Institute, Dollars and Cents of Shopping Centers, 1990 for community shopping centers. See Table 11 for detailed explanations. Figures are based on ULI top ten percent of surveyed stores.

(b) Taxable retail sales in drug stores reported by SBOE are divided by .67 in order to estimate total retail sales.

(c) Taxable retail sales in food stores reported by SBOE are divided by .30 in order to estimate total retail sales. This figure contains figures self-reported by supermarkets to BAE.

(d) Potential new food store area may be understated since average sales per square foot in existing food stores are exceptionally high. See text for additional explanation.

(e) Automotive/auto supplies and service stations are excluded from this analysis.

Sources: State Board of Equalization; State Census Data Center; Bay Area Economics; Urban Land Institute, "Dollars and Cents of Shopping Centers."

RECOMMENDED CHANGES TO THE RETAIL MIX

As described in the previous section, there are several store categories which appear to be able to support new stores. This section explores the types of new stores that could be feasible in the Village, based on a combination of the previous quantitative analysis and preferences expressed by the resident survey, which asked what types of new businesses respondents would like to see in the Village. Respondents were given the opportunity to mention two types of new businesses, and 156 total responses were received. Appendix B provides a tabulation of the responses in descending order of preference.

Resident Preferences That Are Not Feasible

Variety Store. Approximately 13 percent of the responses received cited a variety store as a desired addition to the Village. Many respondents talked about their disappointment when the Freeway Variety store left Montclair and felt the addition of a variety store would accommodate their shopping needs.

Although residents of Montclair and Piedmont clearly desire a new variety store, this type of addition to the Village's retail mix is very unlikely. Retailing has changed a great deal in the past twenty years, and almost all local variety stores have either ceased operations or are struggling to survive. Even national chains like Woolworth's have altered their merchandising strategy, moving from neighborhood-oriented outlets to mall locations. An example of this trend is the recent closure of the Woolworth's in downtown San Francisco. Thus, it is probable that a new variety store will not be feasible as a targeted addition to the retailing mix.

It is important to note that much of the merchandise that variety stores used to supply to shoppers can be found at the larger drugstore facilities. With the opening of the Long's Drugs in the Village (occurred after survey was taken for this study), shoppers may discover that they can once again purchase many of the items they used to buy at Freeway Variety.

Major Department Store. Eight responses indicated an interest in a major department store; unfortunately, the limited size of the Market Area and relatively remote location mean that attraction of such a store is highly unlikely.

Other Preferences. Other desired stores which are probably not feasible in terms of actual market support included a Gap, a women's clothing store, Target, and a movie theater. For the apparel-related items (e.g., Gap, Target, women's clothing store), these responses reflect a desire

to change the type of merchandise offered by the existing merchants; this is discussed further in the Recommendations section. Without closing existing facilities, new apparel stores would likely either be infeasible or, if successful, would cause declining sales at existing stores.

The movie theater requests, mentioned by 5 responses, presents difficulties in actually implementing. Unfortunately, the trend in the movie theater industry is away from small, single screen facilities toward large multiplexes. An exception to this trend has been the moderate to very successful renovation of older movie theaters scattered around the East Bay (e.g., Orinda Theater, Grand Lake Theater, etc.). Since the Village does not have a building offering this kind of renovation opportunity, it is unlikely that a movie theater could be supported or attracted.

Resident Preferences That Are Feasible

Restaurants. Twenty-two responses suggested restaurant additions to the Village, with 10 mentioning a high quality restaurant, and 12 mentioning a family-style facility. The analysis presented above (see Table 12) indicates that both of these types of new retail facilities could be supported by the marketplace in the Village. In fact, one additional restaurant, the Lone Star Cafe, is opening in the Village.

Bakery. Seven responses mentioned an "old style" bakery as desirable. This type of facility could work in the Village, as long as it were carefully positioned to not directly compete with existing bakeries, the offerings of baked goods at the supermarkets, and the new bagel shop. If a bakery were part of a specialty food complex with multiple small vendors, it may enjoy more market success.

Upscale Grocery/Butcher. Again, this type of specialty food store could probably be supported in the Village, but its sales would likely subtract from the sales at existing grocery stores. If such a facility were combined with a bakery and other small specialty food vendors into one complex, it would probably draw from other residents beyond those considered the Market Area, including additional Piedmont residents.

Bookstore. This is a store type that may offer a great deal of potential. Seven responses were for a new bookstore, and the analysis on Table 12 for "other" retail, of which bookstores are a part, suggests strong market support.

Other Preferences. The hardware store and Target cited by several responses reflect a desire for more home furnishings/appliances and building materials/hardware, both of which have the potential to be attracted to the Village based on the additional capturable sales analysis (see Table

12). However, these stores would have to be small in scale; a Target would not select the Village as a location.

A record/CD store offers a possible feasible addition to the retail base. This kind of store, which is considered as part of the "other" retail category showing strong potential for additional market support (see Table 12), could be operated either as an independent entity or in combination with a bookstore.

Summary of Feasible New Store Types

In summary, the types of stores which appear to be desired by the residents, supportable by potential capturable sales, and feasible given the retail industry and the locational characteristics of Montclair are:

Restaurants. In addition to the Lone Star Cafe now opening in the Village, these could include high quality dining such as Olivetto's, upscale Asian (many examples in San Francisco). Family style restaurants such as Zachary's Pizza, Fatapple's (Berkeley and El Cerrito) or Sizzler would also fit well with the demographic profile of the Market Area.

Specialty Food. In addition to the Noah's Bagels that is opening in the Village, this category of supportable new stores could include an "old style" bakery and butcher, as requested by the resident survey. A gourmet coffee/tea store would also complement the Village retail mix. All of these specialty food stores could be grouped together under one roof in a specialty food complex, or could be offered by one vendor. Another type of food store that would probably experience market support is Trader Joe's which offers imported and specialty foods but not fresh baked goods or meat.

Home Furnishings. This category could include smaller specialty home furnishings outlets such as lamp fixtures and fabrics. A small furniture store would also work; however, it is difficult to sell furniture in a small facility, given current merchandising trends.

Building Materials. This category includes hardware and home improvement items. While the trend in general hardware stores has been toward larger stores (such as Home Depot), a type which would not be appropriate for the Village, a small store specializing in home decorating items such as paints, wallpapers, blinds, or other similar items, or a store providing upscale remodeling supplies and services for kitchens and baths might find market support in Montclair.

Bookstore/Records. This category could include a Crown Books, a Tower Books/Records, or an independent offering a more targeted selection of merchandise.

This need has focused on evaluating the Village's current retail activity, its performance relative to similar communities, and its potential for additional retail sales based on targeting a portion of possible visitor Area expenditures.

To address improved retail sales in existing outlets and attract new stores, a number of strategies need to be followed. This section describes some of these strategies in a descending order of their likely impact on the Village's economic base.

Promote the Village's Strengths

The Mountain Culture Association undertakes several annual promotional activities including the popular Village Fair, the Fall with Sale, and periodic year-round markets. However, these activities do not always involve all merchants, and they especially do not necessarily result in additional sales at existing stores.

A more targeted strategy of promotional activities with the explicit purpose of visiting independent shoppers or those that do not come in all the live nearby should be considered. For example, the visitor survey indicated that while grocery stores were the major draw at the Village, visitors of Parkview tended to bypass the Village less than visitors of Mountain. This suggests a coordinated and/or advertising campaign targeted to Parkview residents (e.g., large, affluent families with children). A "welcome visit" promotional event (e.g., joint sale) would also serve this purpose.

The annual Mountain Sale also offers untapped potential. However, it is probable that usually moving goods out to the outdoors is inconvenient for many merchants. This suggests that the concept of a different promotional event held inside the store would generate greater involvement of all merchants. Given the current economic climate, value of goods for sale should be stressed.

Target Merchandise

This report provides extensive demographic information which lays the foundation for targeting merchandise at visitors of the area. Target merchandise such as apparel and gifts offered by stores at the store in the Village should be targeted to offer a range of value: contemporary styles, popular brands, and/or high quality. The Market Area represents one of the best demographic profiles to be found in the Bay Area. Merchandise must be appealing to the regional and

STRATEGIES FOR ENHANCING RETAIL SALES

This report has focused on establishing the Village's current retail activity, its performance relative to similar communities, and its potential for addition retail sales based on capturing a portion of possible Market Area expenditures.

To achieve improved retail sales at existing outlets and attract new stores, a number of strategies could be followed. This section describes some of these strategies in a descending order of their likely impact on the Village's economic base.

Promote the Village's Strengths

The Montclair Business Association undertakes several annual promotional activities including the popular Village Fair, the Sidewalk Sale, and periodic joint coupon mailers. However, these activities do not always involve all merchants, and they reportedly do not necessarily result in enhanced sales at existing stores.

A more consistent strategy of promotional activities with the express purpose of attracting infrequent shoppers or those that do not come at all but live nearby should be formulated. For example, the resident survey indicated that while grocery stores were the major draw to the Village, residents of Piedmont tended to frequent the Village less than residents of Montclair. This suggests a coordinated mail or advertising campaign targeted to Piedmont residents (e.g., large, affluent families with children). A "before school" promotional event (e.g., joint sale) would also serve this purpose.

The annual Sidewalk Sale also offers untapped potential. However, it is probable that actually moving goods out to the sidewalk is impractical for many merchants. This suggests that the concept of a discount promotional event held inside the stores would garner greater involvement of all merchants. Given the current economic climate, value of goods for sale should be stressed.

Target Merchandise

This report provides extensive demographic information which lays the foundation for targeting merchandise to residents of the area. Retail categories such as apparel and gifts offered by some of the stores in the Village should be retargeted to offer a range of value, contemporary styling, popular brands, and/or high quality. The Market Area represents one of the best demographic profiles to be found in the Bay Area. Merchandise must be appealing to the sophisticated,

affluent buyer who otherwise will choose to journey to Broadway Plaza in Walnut Creek, College Avenue in Berkeley/Oakland, Piedmont Avenue, or San Francisco.

Recruit New Stores

This strategy can be as simple as supplying this report (especially the demographics and leakage sections) to active real estate brokers for their use when responding to new tenant inquiries. It can also be more elaborate, by involving volunteer or paid staff time to actually meet with site locators for some of the store types mentioned above.

Make Physical Improvements

Finally, taking a cue from the resident survey, physical improvement strategies could be undertaken. For example, many respondents suggested that more convenient parking would encourage them to shop more frequently in the Village, although it is important to note that this factor did not explain why these residents shopped elsewhere for key retail items.

Parking improvements, and the traffic flow improvements that are related, can be an expensive undertaking. In addition, improving the parking pattern in the Village is difficult due to the lack of space to develop parking lots or garages. Nevertheless, this subject should be further explored by a parking expert.

Other physical improvements to the Village could also serve to enhance sales. For example, signage is an important item that is relatively cost-effective to improve. Many shopping districts have devised an attractive logo or series of themes, and implemented a banner/sign program promoting the concept throughout the area. For the Village, this could be as simple as placing signs and directories at all entrances to the district with an attractive "Montclair Village" logo. Individual store signs could also be made more attractive and consistent by instituting a sign ordinance or a more voluntary program.

Finally, there are variety of architectural styles and building configurations in the Village, which add visual interest but also sometimes create a sense of dissonance. While major renovation of existing facades is not recommended, a set of design guidelines to steer future development and/or building renovations would be appropriate for the Village.

APPENDIX A
SURVEY INSTRUMENT

APPENDICES

Appendix A

Appendix A
Survey Instrument
Appendix A

Appendix A
Survey Instrument
Appendix A

Appendix A
Survey Instrument
Appendix A

APPENDIX A

SURVEY INSTRUMENT

Appendix A
Survey Instrument
Appendix A

- (a) 1st Floor
- (b) 2nd Floor
- (c) 3rd Floor
- (d) Ground
- (e) Not applicable

Appendix A
Survey Instrument
Appendix A

- (a) 1st Floor
- (b) 2nd Floor
- (c) 3rd Floor
- (d) 4th Floor
- (e) 5th Floor
- (f) 6th Floor
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- (h) 8th Floor
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IF RESPONDENT ANSWERS ANY OF QUESTIONS 1-10, PLEASE GO TO QUESTION 11.
IF RESPONDENT ANSWERS ANY OF QUESTIONS 11-20, PLEASE GO TO QUESTION 21.
IF RESPONDENT ANSWERS ANY OF QUESTIONS 21-30, PLEASE GO TO QUESTION 31.
IF RESPONDENT ANSWERS ANY OF QUESTIONS 31-40, PLEASE GO TO QUESTION 41.
IF RESPONDENT ANSWERS ANY OF QUESTIONS 41-50, PLEASE GO TO QUESTION 51.
IF RESPONDENT ANSWERS ANY OF QUESTIONS 51-60, PLEASE GO TO QUESTION 61.
IF RESPONDENT ANSWERS ANY OF QUESTIONS 61-70, PLEASE GO TO QUESTION 71.
IF RESPONDENT ANSWERS ANY OF QUESTIONS 71-80, PLEASE GO TO QUESTION 81.
IF RESPONDENT ANSWERS ANY OF QUESTIONS 81-90, PLEASE GO TO QUESTION 91.
IF RESPONDENT ANSWERS ANY OF QUESTIONS 91-100, PLEASE GO TO QUESTION 101.

Montclair Residents Survey

Name of Person Interviewed:

Phone Number:

Address:

Call Back Arrangements

Date:

Time:

Hello, my name is _____ I'm calling residents in Montclair and Piedmont on behalf of the merchants at Montclair Village. We're trying to find out how Montclair Village could be improved to better meet the needs of shoppers. We'd like to get your input. Your responses to all questions are confidential and anonymous and the survey will take about five minutes. Could I ask you some questions about your shopping needs?

1. How many times a week do you make any kind of retail purchases? This would include grocery shopping, eating at restaurants, and other purchases.

- (a) 1 to 2 times
- (b) 3 to 4 times
- (c) 5 to 6 times
- (d) Everyday
- (e) Less than once a week

2. How many times a week do you shop at any store in Montclair Village?

- (a) less than once a week
- (b) 1 to 2 times
- (c) 3 to 4 times
- (d) 5 to 6 times
- (e) Everyday
- (f) don't shop at Montclair Village

IF RESPONDENT DOES NOT SHOP AT MONTCLAIR VILLAGE (ANSWER F) SKIP TO QUESTION 5.

3. You mentioned you shop at Montclair Village. What type of purchase most frequently brings you to Montclair Village?

- (a) Major Grocery Store
- (b) Convenience Grocery Store
- (c) Drugstore
- (d) Bookstore
- (e) Hardware Store
- (f) Variety Store
- (g) Family Restaurant
- (h) Fast Food Restaurant
- (i) Men's Clothing
- (j) Women's Clothing
- (k) Children's Clothing
- (l) Automotive Supplies
- (m) Automotive Service
- (n) Butcher
- (n) Specialty Foods
- (o) Other (specify) _____

4. Is there any other type of purchase which frequently brings you to Montclair Village?

- (a) Major Grocery Store
- (b) Convenience Grocery Store
- (c) Drugstore
- (d) Bookstore
- (e) Hardware Store
- (f) Variety Store
- (g) Family Restaurant
- (h) Fast Food Restaurant
- (i) Men's Clothing
- (j) Women's Clothing
- (k) Children's Clothing
- (l) Automotive Supplies
- (m) Automotive Service
- (n) Butcher
- (n) Specialty Foods
- (o) Other (specify) _____

5. At what store do you most frequently shop for groceries?

- (a) Montclair Lucky's
- (b) Montclair Safeway
- (c) Safeway on College Ave.
- (d) Safeway on Grand Ave.
- (e) Safeway at Rockridge
- (f) Lucky on College Ave.
- (g) Lucky on Lakeshore Ave
- (h) Piedmont Grocery
- (i) Other (please specify)_____

6. Is there any other store at which you regularly shop for groceries?

- (a) Montclair Lucky's
- (b) Montclair Safeway
- (c) Safeway on College Ave.
- (d) Safeway on Grand Ave.
- (e) Safeway at Rockridge
- (f) Lucky on College Ave.
- (g) Lucky on Lakeshore Ave
- (h) Piedmont Grocery
- (i) Other (please specify)_____

IF GROCERY STORE GIVEN AS FIRST CHOICE (QUESTION 5) IS IN MONTCLAIR VILLAGE (ANSWERS A OR B) SKIP TO QUESTION 8.

7. You mentioned you most frequently shop at _____. Why do you shop at _____ rather than in Montclair Village?

- (a) Quality of goods
- (b) variety of goods available
- (c) Price of goods
- (d) Parking
- (e) Customer Service
- (f) Convenient location to home/work
- (g) other (specify)

8. In what shopping area do you most frequently shop for clothing?

- (a) Montclair
- (b) Piedmont Ave.
- (c) College Ave.
- (d) Rockridge
- (e) Lakeshore/Grand Ave.
- (g) Bay Fair Mall
- (h) Walnut Creek
- (i) Hilltop Mall (Richmond)
- (j) Sun Valley Mall
- (k) Downtown Oakland
- (l) Downtown Berkeley/North Berkeley
- (m) Other _____

9. Is there any other shopping area at which you shop for clothing?

- (a) Montclair
- (b) Piedmont Ave.
- (c) College Ave.
- (d) Rockridge
- (e) Lakeshore/Grand Ave.
- (g) Bay Fair Mall
- (h) Walnut Creek
- (i) Hilltop Mall (Richmond)
- (j) Sun Valley Mall
- (k) Downtown Oakland
- (l) Downtown Berkeley/North Berkeley
- (m) Other _____

IF SHOPPING AREA GIVEN AS FIRST CHOICE (QUESTION 8) IS MONTCLAIR, SKIP TO QUESTION 11.

10. You mentioned you most frequently shop at _____. Why do you shop at _____ rather than at Montclair Village?

- (a) Quality of goods
- (b) variety of goods available
- (c) Price of goods
- (d) Parking
- (e) Customer Service
- (f) Convenient location to home/work
- (g) other (specify)

11. In what shopping area do you most frequently eat out with your family?

- (a) Montclair
- (b) Piedmont Ave.
- (c) College Ave.
- (d) Rockridge
- (e) Grand Ave.
- (f) Jack London Square
- (g) Other _____

12. Is there any other area in which you regularly eat out with your family?

- (a) Montclair
- (b) Piedmont Ave.
- (c) College Ave.
- (d) Rockridge
- (e) Grand Ave.
- (f) Jack London Square
- (g) Other _____

IF RESTAURANT OR BUSINESS DISTRICT GIVEN AS FIRST CHOICE (QUESTION 11) IS MONTCLAIR, SKIP TO QUESTION 14.

13. You mentioned you most frequently eat out in _____. Why do you eat out in _____ rather than in Montclair Village?

- (a) Quality of restaurant
- (b) Variety of restaurants available
- (c) More family appropriate restaurants
- (d) Price of restaurants
- (e) Parking
- (f) Customer Service
- (g) Convenient location to home/work
- (h) other (specify)

14. What new business would you most like to see added to Montclair Village?

- (a) Major Grocery Store
- (b) Convenience Grocery Store
- (c) Drugstore
- (d) Bookstore
- (e) Hardware Store
- (f) Variety Store
- (g) Family Restaurant
- (h) Fast Food Restaurant
- (i) Men's Clothing
- (j) Women's Clothing
- (k) Children's Clothing
- (l) Automotive Supplies
- (m) Automotive Service
- (n) Butcher
- (n) Specialty Foods
- (o) Other (specify) _____

15. Is there any other new business you would like to see added to Montclair Village?

- (a) Major Grocery Store
- (b) Convenience Grocery Store
- (c) Drugstore
- (d) Bookstore
- (e) Hardware Store
- (f) Variety Store
- (g) Family Restaurant
- (h) Fast Food Restaurant
- (i) Men's Clothing
- (j) Women's Clothing
- (k) Children's Clothing
- (l) Automotive Supplies
- (m) Automotive Service
- (n) Butcher
- (n) Specialty Foods
- (o) Other (specify) _____

16. What could be done at Montclair Village to encourage you to shop there more often?

(CIRCLE THE LETTER OF THE RESPONSE)

- (a) More convenient parking
- (b) Improve traffic flow
- (c) Change visual appearance (facade improvements)
- (d) Improve retail mix
- (e) Lower prices
- (f) Greater customer service
- (g) Other (please specify) _____
- (h) Nothing I won't shop there

17. Is there anything else that could be done at Montclair Village to encourage you to shop there more often?

(CIRCLE THE LETTER OF THE RESPONSE)

- (a) More convenient parking
- (b) Improve traffic flow
- (c) Change visual appearance (facade improvements)
- (d) Improve retail mix
- (e) Lower prices
- (f) Greater customer service
- (g) Other (please specify) _____
- (h) Nothing I won't shop there

Finally we'd like to ask you some questions about your household.

18. How many people live in your household, including yourself?

- (a) 1
- (b) 2
- (c) 3
- (d) 4
- (e) 5 or more

19. Of the people living in your household, how many are children under 18 years of age?

- (a) 1
- (b) 2
- (c) 3
- (d) 4 or more

20. Are you between the ages of:

(READ AGE RANGES, ASK THEM TO STOP YOU AT CORRECT RANGE)

- (a) 18 to 24 years
- (b) 25 to 34 years
- (c) 35 to 44 years
- (d) 45 to 54 years
- (e) 55 to 64 years
- (f) Over 65 years

Does your annual household income fall between:

(READ AGE RANGES, ASK THEM TO STOP YOU AT CORRECT RANGE)

- (a) \$0 to \$15,000
- (b) \$15,000 to \$25,000
- (c) \$25,000 to \$35,000
- (d) \$35,000 to \$50,000
- (e) \$50,000 to \$75,000
- (f) \$75,000 or More

Thank you very much for taking the time to participate in this study.

Appendix B: Montclair Shopper Survey Responses

	All Respondents		Montclair Only		Piedmont Only	
How many times a week do you shop?	Number	Percent	Number	Percent	Number	Percent
Less than once a week	1	1.0%	0	0.0%	1	5.6%
1 to 2 times	12	12.1%	9	11.1%	3	16.7%
3 to 4 times	39	39.4%	33	40.7%	6	33.3%
5 to 6 times	18	18.2%	12	14.8%	6	33.3%
Every Day	29	29.3%	27	33.3%	2	11.1%
Total	99	100.0%	81	100.0%	18	100.0%

How many times a week do you shop at Montclair Village?

	Number	Percent	Number	Percent	Number	Percent
Less than once a week	10	10.1%	6	7.4%	4	22.2%
1 to 2 times	32	32.3%	26	32.1%	6	33.3%
3 to 4 times	28	28.3%	26	32.1%	2	11.1%
5 to 6 times	12	12.1%	12	14.8%	0	0.0%
Every Day	9	9.1%	8	9.9%	1	5.6%
Don't shop at Village	8	8.1%	3	3.7%	5	27.8%
Total	99	100.0%	81	100.0%	18	100.0%

What type of purchase most frequently brings you to Montclair Village?

	Number	Percent	Number	Percent	Number	Percent
Major Grocery Store	82	90.1%	73	92.4%	9	75.0%
Other	9	9.9%	6	7.6%	3	25.0%
Total	91	100.0%	79	100.0%	12	100.0%

What other type of shopping brings you frequently to Montclair Village?

	Number	Percent	Number	Percent	Number	Percent
Drugstore	13	17.3%	13	20.0%	0	0.0%
Family Restaurant	8	10.7%	8	12.3%	0	0.0%
Bank	6	8.0%	5	7.7%	1	10.0%
Video Store	6	8.0%	4	6.2%	2	20.0%
Major Grocery Store	5	6.7%	3	4.6%	2	20.0%
Coffee Shop	4	5.3%	3	4.6%	1	10.0%
Dry Cleaner	4	5.3%	4	6.2%	0	0.0%
Hardware Store	3	4.0%	3	4.6%	0	0.0%
Women's Clothing	3	4.0%	2	3.1%	1	10.0%
Automotive Service	2	2.7%	1	1.5%	1	10.0%
Deli	2	2.7%	2	3.1%	0	0.0%
Liquor and Wine Store	2	2.7%	2	3.1%	0	0.0%
Stationery Store	2	2.7%	2	3.1%	0	0.0%
Other	15	20.0%	13	20.0%	2	20.0%
Total	75	100.0%	65	100.0%	10	100.0%

Where do you most frequently shop for groceries?

	Number	Percent	Number	Percent	Number	Percent
Montclair Lucky or Safeway	78	79.6%	69	86.3%	9	50.0%
Safeway at Rockridge	7	7.1%	4	5.0%	3	16.7%
Safeway on Grand Ave.	3	3.1%	0	0.0%	3	16.7%
Lucky on Lakeshore	2	2.0%	0	0.0%	2	11.1%
Koda's Produce (Montclair)	2	2.0%	2	2.5%	0	0.0%
Other	6	6.1%	5	6.3%	1	5.6%
Total	98	100.0%	80	100.0%	18	100.0%

Appendix B: Montclair Shopper Survey Responses

	All Respondents		Montclair Only		Piedmont Only	
Any other store you frequently shop at for groceries?						
	Number	Percent	Number	Percent	Number	Percent
Montclair Lucky or Safeway	48	66.7%	43	70.5%	5	45.5%
Safeway at Rockridge	4	5.6%	1	1.6%	3	27.3%
Piedmont Grocery	3	4.2%	3	4.9%	0	0.0%
Village Market	3	4.2%	3	4.9%	0	0.0%
Koda's Market (Montclair)	2	2.8%	2	3.3%	0	0.0%
Safeway on Grand Ave.	2	2.8%	1	1.6%	1	9.1%
Other	10	13.9%	8	13.1%	2	18.2%
Total	72	100.0%	61	100.0%	11	100.0%

Why do you shop outside village for groceries?

	Number	Percent	Number	Percent	Number	Percent
Variety of goods available	6	30.0%	5	45.5%	1	11.1%
Convenient location to work/home	5	25.0%	1	9.1%	4	44.4%
Parking	2	10.0%	0	0.0%	2	22.2%
Other	7	35.0%	5	45.5%	2	22.2%
Total	20	100.0%	11	100.0%	9	100.0%

Where do you most frequently shop for clothing?

	Number	Percent	Number	Percent	Number	Percent
San Francisco	24	24.7%	20	25.3%	4	22.2%
Walnut Creek	20	20.6%	14	17.7%	6	33.3%
Downtown Oakland	12	12.4%	12	15.2%	0	0.0%
Montclair	10	10.3%	9	11.4%	1	5.6%
Sun Valley Mall	6	6.2%	5	6.3%	1	5.6%
Hilltop Mall	4	4.1%	4	5.1%	0	0.0%
Berkeley	3	3.1%	2	2.5%	1	5.6%
Other	14	14.4%	11	13.9%	3	16.7%
Don't shop for clothes	4	4.1%	2	2.5%	2	11.1%
Total	97	100.0%	79	100.0%	18	100.0%

Any other area you shop for clothing?

	Number	Percent	Number	Percent	Number	Percent
Walnut Creek	11	16.7%	9	17.0%	2	15.4%
Bay Fair Mall	7	10.6%	7	13.2%	0	0.0%
Downtown Oakland	7	10.6%	7	13.2%	0	0.0%
San Francisco	6	9.1%	6	11.3%	0	0.0%
Sun Valley Mall	5	7.6%	4	7.5%	1	7.7%
Montclair	4	6.1%	1	1.9%	3	23.1%
Berkeley	3	4.5%	3	5.7%	0	0.0%
Lakeshore/Grand Ave.	2	3.0%	1	1.9%	1	7.7%
Other	16	24.2%	12	22.6%	4	30.8%
Don't shop for clothes	5	7.6%	3	5.7%	2	15.4%
Total	66	100.0%	53	100.0%	13	100.0%

Why do you shop for clothing outside the village?

	Number	Percent	Number	Percent	Number	Percent
Variety of goods available	42	51.9%	35	52.2%	7	50.0%
Convenient location to home/work	11	13.6%	10	14.9%	1	7.1%
Price of goods	8	9.9%	7	10.4%	1	7.1%
They have a Nordstrom	5	6.2%	3	4.5%	2	14.3%
Parking	4	4.9%	3	4.5%	1	7.1%
Quality of goods available	4	4.9%	4	6.0%	0	0.0%
Other	7	8.6%	5	7.5%	2	14.3%
Total	81	100.0%	67	100.0%	14	100.0%

Appendix B: Montclair Shopper Survey Responses

	All Respondents		Montclair Only		Piedmont Only	
In what area do you eat out most frequently with your family?						
	Number	Percent	Number	Percent	Number	Percent
Montclair	25	28.1%	23	31.5%	2	12.5%
San Francisco	11	12.4%	7	9.6%	4	25.0%
Piedmont Avenue	9	10.1%	7	9.6%	2	12.5%
College Avenue/Rockridge	9	10.1%	9	12.3%	0	0.0%
Oakland Chinatown	7	7.9%	7	9.6%	0	0.0%
Jack London Square	5	5.6%	5	6.8%	0	0.0%
Berkeley	5	5.6%	2	2.7%	3	18.8%
Other Oakland	5	5.6%	2	2.7%	3	18.8%
Other	13	14.6%	11	15.1%	2	12.5%
Total	89	100.0%	73	100.0%	16	100.0%

In what other area do you frequently eat out with your family?						
	Number	Percent	Number	Percent	Number	Percent
Piedmont Avenue	10	14.5%	9	15.8%	1	8.3%
Montclair	8	11.6%	7	12.3%	1	8.3%
Berkeley	8	11.6%	6	10.5%	2	16.7%
Jack London Square	6	8.7%	3	5.3%	3	25.0%
San Francisco	6	8.7%	5	8.8%	1	8.3%
College Avenue/Rockridge	6	8.7%	5	8.8%	1	8.3%
Other Oakland	6	8.7%	3	5.3%	3	25.0%
Other	19	27.5%	19	33.3%	0	0.0%
Total	69	100.0%	57	100.0%	12	100.0%

Why do you most frequently eat outside of Montclair Village with your family?						
	Number	Percent	Number	Percent	Number	Percent
Quality of the restaurant(s)	17	27.4%	11	22.9%	6	42.9%
Variety of restaurants available	15	24.2%	14	29.2%	1	7.1%
Convenient location to home/work	6	9.7%	3	6.3%	3	21.4%
Price of restaurants	5	8.1%	4	8.3%	1	7.1%
Other	19	30.6%	16	33.3%	3	21.4%
Total	62	100.0%	48	100.0%	14	100.0%

Combined responses for next two questions regarding what new business(es) you would like to see added to Montclair Village?						
	Number	Percent	Number	Percent	Number	Percent
Variety Store	20	12.8%	20	15.5%	0	0.0%
Family Restaurant	12	7.7%	10	7.8%	2	7.4%
Better Quality Restaurant	10	6.4%	9	7.0%	1	3.7%
Major Department Store	8	5.1%	5	3.9%	3	11.1%
Traditional Bakery	7	4.5%	6	4.7%	1	3.7%
Bookstore	7	4.5%	6	4.7%	1	3.7%
Butcher	7	4.5%	7	5.4%	0	0.0%
Upscale Major Grocery Store	6	3.8%	3	2.3%	3	11.1%
Gap Clothing Store	5	3.2%	4	3.1%	1	3.7%
Hardware Store	5	3.2%	4	3.1%	1	3.7%
Movie Theater	5	3.2%	5	3.9%	0	0.0%
Record/CD Store	5	3.2%	5	3.9%	0	0.0%
Target	4	2.6%	2	1.6%	2	7.4%
Women's Clothing Store	4	2.6%	3	2.3%	1	3.7%
Other	51	32.7%	40	31.0%	11	40.7%
Total	156	100.0%	129	100.0%	27	100.0%

(The above tabulation includes combined responses for the two following questions regarding new businesses preferred.)

Appendix B: Montclair Shopper Survey Responses

	All Respondents		Montclair Only		Piedmont Only	
What new business would you most like to see added to Montclair Village?	Number	Percent	Number	Percent	Number	Percent
Variety Store	14	15.4%	14	18.4%	0	0.0%
Family Restaurant	7	7.7%	6	7.9%	1	6.7%
Better Quality Restaurant	6	6.6%	5	6.6%	1	6.7%
Major Department Store	5	5.5%	2	2.6%	3	20.0%
Traditional Bakery	4	4.4%	4	5.3%	0	0.0%
Bookstore	4	4.4%	3	3.9%	1	6.7%
Butcher	4	4.4%	4	5.3%	0	0.0%
Upscale Major Grocery Store	4	4.4%	2	2.6%	2	13.3%
Gap Clothing Store	3	3.3%	2	2.6%	1	6.7%
Hardware Store	3	3.3%	2	2.6%	1	6.7%
Movie Theater	3	3.3%	3	3.9%	0	0.0%
Record/CD Store	3	3.3%	3	3.9%	0	0.0%
Target	2	2.2%	1	1.3%	1	6.7%
Women's Clothing Store	2	2.2%	1	1.3%	1	6.7%
Other	27	29.7%	24	31.6%	3	20.0%
Total	91	100.0%	76	100.0%	15	100.0%

What other new business would you like to see added to Montclair Village?

	Number	Percent	Number	Percent	Number	Percent
Variety Store	6	9.2%	6	11.3%	0	0.0%
Bookstore	5	7.7%	4	7.5%	1	8.3%
Major Department Store	4	6.2%	4	7.5%	0	0.0%
Traditional Bakery	3	4.6%	3	5.7%	0	0.0%
Target	3	4.6%	2	3.8%	1	8.3%
Women's Clothing Store	3	4.6%	3	5.7%	0	0.0%
Automotive Supplies	3	4.6%	3	5.7%	0	0.0%
Better Quality Restaurant	2	3.1%	1	1.9%	1	8.3%
Butcher	2	3.1%	2	3.8%	0	0.0%
Family Restaurant	2	3.1%	2	3.8%	0	0.0%
Fast Food Restaurant	2	3.1%	2	3.8%	0	0.0%
Gap Clothing Store	2	3.1%	2	3.8%	0	0.0%
Movie Theater	2	3.1%	1	1.9%	1	8.3%
Upscale Major Grocery Store	2	3.1%	2	3.8%	0	0.0%
Other	24	36.9%	16	30.2%	8	66.7%
Total	65	100.0%	53	100.0%	12	100.0%

Combined responses for next two questions regarding what two things could be done to encourage you to shop in Montclair Village more often?

	Number	Percent	Number	Percent	Number	Percent
More convenient parking	53	36.6%	41	34.2%	12	48.0%
Improve retail mix	23	15.9%	19	15.8%	4	16.0%
Less office space at ground level	13	9.0%	10	8.3%	3	12.0%
Lower prices	9	6.2%	7	5.8%	2	8.0%
Satisfied, likes to shop there	6	4.1%	6	5.0%	0	0.0%
Better Security	4	2.8%	3	2.5%	1	4.0%
Open Later Hours	4	2.8%	4	3.3%	0	0.0%
Improve Customer Service	4	2.8%	4	3.3%	0	0.0%
Other	29	20.0%	26	21.7%	3	12.0%
Total	145	100.0%	120	100.0%	25	100.0%

(The above tabulation includes combined responses for the two following questions.)

Appendix B: Montclair Shopper Survey Responses

	All Respondents		Montclair Only		Piedmont Only	
What could be done to encourage you to shop in Montclair Village more often?						
	Number	Percent	Number	Percent	Number	Percent
More convenient parking	43	45.7%	34	44.2%	9	52.9%
Improve retail mix	14	14.9%	11	14.3%	3	17.6%
Less office space at ground level	7	7.4%	5	6.5%	2	11.8%
Lower prices	4	4.3%	3	3.9%	1	5.9%
Satisfied, likes to shop there	3	3.2%	3	3.9%	0	0.0%
Better Security	2	2.1%	1	1.3%	1	5.9%
Open Later Hours	2	2.1%	2	2.6%	0	0.0%
Improve Customer Service	2	2.1%	2	2.6%	0	0.0%
Other	17	18.1%	16	20.8%	1	5.9%
Total	94	100.0%	77	100.0%	17	100.0%

Is there anything else that could be done at Montclair Village to encourage you to shop there more often?

	Number	Percent	Number	Percent	Number	Percent
Improve Retail Mix	10	19.6%	7	16.3%	3	37.5%
More Convenient Parking	9	17.6%	8	18.6%	1	12.5%
Improve Traffic Flow	6	11.8%	5	11.6%	1	12.5%
Lower Prices	5	9.8%	4	9.3%	1	12.5%
Less Office Space at Ground Level	3	5.9%	3	7.0%	0	0.0%
Change Visual Appearance	2	3.9%	2	4.7%	0	0.0%
Open Later Hours	2	3.9%	2	4.7%	0	0.0%
Satisfied, likes to shop there	2	3.9%	2	4.7%	0	0.0%
Other	12	23.5%	10	23.3%	2	25.0%
Total	51	100.0%	43	100.0%	8	100.0%

How many people are in your household?

	Number	Percent	Number	Percent	Number	Percent
One person	13	13.0%	12	14.6%	1	5.6%
Two people	48	48.0%	36	43.9%	12	66.7%
Three people	19	19.0%	17	20.7%	2	11.1%
Four people	16	16.0%	15	18.3%	1	5.6%
Five people or more	4	4.0%	2	2.4%	2	11.1%
Total	100	100.0%	82	100.0%	18	100.0%

How many people under 18 years of age are in your household?

	Number	Percent	Number	Percent	Number	Percent
None	67	67.0%	54	65.9%	13	72.2%
One person	17	17.0%	15	18.3%	2	11.1%
Two people	11	11.0%	10	12.2%	1	5.6%
Three people	4	4.0%	3	3.7%	1	5.6%
Four or more people	1	1.0%	0	0.0%	1	5.6%
Total	100	100.0%	82	100.0%	18	100.0%

Appendix B: Montclair Shopper Survey Responses

Age of respondent:	All Respondents		Montclair Only		Piedmont Only	
	Number	Percent	Number	Percent	Number	Percent
18 to 24 years	1	1.0%	1	1.2%	0	0.0%
25 to 34 years	12	12.1%	10	12.3%	2	11.1%
35 to 44 years	24	24.2%	20	24.7%	4	22.2%
45 to 54 years	22	22.2%	20	24.7%	2	11.1%
55 to 64 years	15	15.2%	11	13.6%	4	22.2%
Over 65 years	25	25.3%	19	23.5%	6	33.3%
Total	99	100.0%	81	100.0%	18	100.0%

Annual household income:	All Respondents		Montclair Only		Piedmont Only	
	Number	Percent	Number	Percent	Number	Percent
Less than \$15,000	1	1.3%	1	1.5%	0	0.0%
\$15,000 to \$24,999	1	1.3%	1	1.5%	0	0.0%
\$25,000 to \$34,999	5	6.4%	5	7.6%	0	0.0%
\$35,000 to \$49,999	8	10.3%	6	9.1%	2	16.7%
\$50,000 to \$74,999	25	32.1%	20	30.3%	5	41.7%
\$75,000 or more	38	48.7%	33	50.0%	5	41.7%
Total	78	100.0%	66	100.0%	12	100.0%

Notes:

Percentages may not add to 100 percent due to independent rounding.

Source: Bay Area Economics, 1992.

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